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Chapter 1 - How to Use This Guide

1.1. Purpose

This Guide explains how to use the Department of Education and Communities’ (DEC) Access Request Process, which electronically manages the processes for Panels evaluating Access Requests.

The Access Request Process is integrated within the existing Access Request that is initiated by schools. Once an Access Request is completed by a school and Submitted, then the Access Request will be automatically available in the Access Request Process software for action by the appropriate DEC Learning and Engagement Staff.

The Access Request covered the workflow at the school level to request additional services for students with disabilities and/or additional learning and support needs. The Access Request Process extends the electronic workflow to allow for an approval workflow for an Access Request once it has been submitted.

1.2. Structure

This document has 12 Chapters and a series of Appendices. The Chapters are:

1. **How to Use this Guide**: Explains the general structure and purpose of the Access Request Process User Guide.

2. **Access Request Process**: Offers an overview of the approach to finalising Access Requests.
3. **Getting Started**: Gets you logged in and takes you through the program functions.

4. **Common Tasks**: Offers details and instructions for all the main tasks of the process.

5. **Assigning Roles**: Explains how to set up a new User.

6. **Post Office**: Is the first stage of the four-stage process. This is where the Access Request is first delivered.

7. **Clearing Houses**: Offers an overview of the Clearing Houses tab, and explains its overall function both before and after the Panel.

8. **Clearing Houses before the Panel**: Covers the processes for Clearing House Coordinators when they first receive Priorities under an Access Request, allocated from the Post Office.

9. **Panels**: Details the approach the Panels take in assessing Panel Priority Outcomes. This is before they are returned to the Clearing House again for final determination/s.

10. **Clearing Houses after the Panels**: This is the final stage before the Access Request is completed. The Clearing House Coordinator (AR/P1 Owner), that is, the Coordinator assigned Priority 1 of an Access Request, makes final determinations. This is done by them through assessing all Priorities under an Access Request, reviewing the Priority Statuses from the Panel, communicating with stakeholders and finalising the Access Request.

11. **Creating Reports**: Provides a range of options including Integration Funding Support download for State Office, SCAS registrations and statistical reports.

12. **Handy Hints, System Rules and User Conventions**: Provides practical hints about using the system. These are also featured throughout this Guide.

13. **Appendices**: contain reference materials such as tables and checklists.
1.3. Features

This User Guide has a number of helpful features throughout, including:

- **Cross-references** to further explanations, processes and other relevant information.

- **Handy hints** are detailed in Chapter 12. When they are provided throughout the Guide, they are identified by the light bulb icon:

- When a user receives an **email notification**, an envelope icon appears in this document:

- **Screenshots** show what the user should see on the screen at any given step.

- **Checklists** show the tasks for each role under each stage: for example,
  - User Checklist for the Clearing House Coordinator as the Clearing House Coordinator (AR/P1 Owner). That is, they are assigned Priority 1 of an Access Request and are thus the Owner of the Access Request, and
  - the Clearing House Coordinator (P2, P3), who has a less action-based role than the Clearing House Coordinator (AR/P1 Owner), in Chapters 8, 9 and 11.

- **Flowcharts** explain the decision-making process for each role.

- The Appendices contain a number of tables and further reference materials.

1.4. Common abbreviations

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>AR: Access Request</td>
<td>Access Request</td>
</tr>
<tr>
<td>PO: Post Office</td>
<td>Post Office</td>
</tr>
<tr>
<td>CH: Clearing House</td>
<td>Clearing House</td>
</tr>
<tr>
<td>CHC: Clearing House  Coordinator</td>
<td>Clearing House Coordinator</td>
</tr>
<tr>
<td>CHC (AR/P1 Owner):</td>
<td>Clearing House Coordinator as the Clearing House Coordinator assigned Priority 1 of an Access Request, and thus the Owner of the Access Request</td>
</tr>
<tr>
<td>Panel:</td>
<td>Panel</td>
</tr>
<tr>
<td>P1, P2, P3: Priority</td>
<td>Priority 1, Priority 2, Priority 3</td>
</tr>
</tbody>
</table>
Panel C  Panel Convenor
Integration FS  Integration Funding Support
DESU  Distance Education Support Unit
SSC  Special School Centre
AMU  Access Management Utility
ERN  Enrolment Registration Number
SCAS  Support Class Administration System
SRN  Student Registration Number
ES  Educational Services

1.4.1. Icons

The program uses icons that give users quick visual cues of the primary purpose of the item or their function. This following table lists all the icons used in the Access Request Process program.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
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<td><img src="image" alt="Attachment" /></td>
<td>Attachment</td>
</tr>
<tr>
<td><img src="image" alt="School allowed to upload an attachment" /></td>
<td>School allowed to upload an attachment</td>
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<tr>
<td><img src="image" alt="Spell checker" /></td>
<td>Spell checker</td>
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<tr>
<td><img src="image" alt="Pre-Panel Meeting" /></td>
<td>Pre-Panel Meeting</td>
</tr>
<tr>
<td><img src="image" alt="Post Office/Clearing House transfer" /></td>
<td>Post Office/Clearing House transfer</td>
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<td><img src="image" alt="Calendar" /></td>
<td>Calendar</td>
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<tr>
<td><img src="image" alt="Search" /></td>
<td>Search</td>
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<tr>
<td><img src="image" alt="Remove" /></td>
<td>Remove</td>
</tr>
<tr>
<td><img src="image" alt="See drop-down menu options" /></td>
<td>See drop-down menu options</td>
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<tr>
<td><img src="image" alt="Priorities assigned to me" /></td>
<td>Priorities assigned to me</td>
</tr>
<tr>
<td><img src="image" alt="My unassigned Priorities" /></td>
<td>My unassigned Priorities</td>
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### Icon Table

<table>
<thead>
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<th>Icon</th>
<th>Description</th>
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<tbody>
<tr>
<td>🔄</td>
<td>My Priorities assigned to Panels</td>
</tr>
<tr>
<td>🔄</td>
<td>My Priorities back from Panel</td>
</tr>
<tr>
<td>🔥</td>
<td>Priorities assigned to others</td>
</tr>
<tr>
<td>🔥</td>
<td>Other unassigned Priorities</td>
</tr>
<tr>
<td>🔄</td>
<td>Other priorities assigned to Panels</td>
</tr>
<tr>
<td>🔄</td>
<td>Other priorities back from Panel</td>
</tr>
<tr>
<td>🔄</td>
<td>History of Priority or outcome</td>
</tr>
<tr>
<td>🔄</td>
<td>Download</td>
</tr>
<tr>
<td>🔥</td>
<td>Priorities assigned to me (Return to School)</td>
</tr>
<tr>
<td>🔥</td>
<td>Priorities assigned to others (Return to School)</td>
</tr>
</tbody>
</table>

### 1.5. Assigning roles to Learning and Engagement Personnel

An officer from Disability, Learning and Support will assign specific profiles to each Learning and Engagement staff member. There are specific profiles relevant to Learning and Engagement Officers, Advisors and Coordinators.

- Generally Learning and Engagement Coordinators (LEC) are able to action and view all aspects of the Access Request process within their Educational Services area.
- Generally Learning and Engagement Officers (LEO) and Advisors (LEA) are able to action and view all aspects of the Access Request process as it relates to the Principal Networks for which they have responsibility.
In addition Learning and Engagement Advisors receive specific emails related to their Principal Networks (see Email Notifications)

<table>
<thead>
<tr>
<th>Role</th>
<th>LEC</th>
<th>LEA</th>
<th>LEO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Office Administrator</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Senior Post Office Administrator</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Clearing House Coordinator</td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Senior Clearing House Coordinator</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Non State-wide Panel Convenor</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Non State-wide Panel Member</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>State-wide Panel Convenor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State-wide Panel Member</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Clearing House Administrator</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Non State-wide Panel Administrator</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>State-wide Panel Administrator</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Chapter 2 - Access Request Process

2.1. How the overall process works

The Access Request (for schools) and Access Request Process programs allow access to a range of support provisions and enrolment options for students with disability and additional learning and support needs. Once a school has submitted its Access Request, the Panel Process begins.

The Panel Process is detailed in this Guide. The figure below illustrates the general workflow across Panel Process.
2.2. Statues

There are a range of statuses throughout the Access Request Process. These are explained in tables in the Appendix 1. The statuses referred to in this document are related to Access Request Statuses and Priority Statuses.

ONE ACTIVE ACCESS REQUEST PER STUDENT:
A student can only have one active Access Request at any given time. However an Access Request can have up to three Priorities.

Access Request Statuses that relate to the Access Request Process after the Access Request has been submitted by the school:

- Submitted
- In Progress
- Declined
- Completed
- Withdrawn by Principal Network

Priority Statuses:

- To be Assigned
- Assigned to Clearing House
- Assigned to Panel
- Withdrawn
- Return to School
- Deferred
- Supported
- Declined
- Supported (On Hold)
- Supported (No Further Action)
- Deferred (No Further Action)
- Return to Clearing House
2.3. Four main stages in the Access Request Process

There are four main stages to the Access Request Process:

1. My Post Office
2. Clearing Houses: Before the Panel
3. Panels

These four stages are detailed below.

**Stage 1: My Post Office**

The Post Office can only be viewed by those assigned the role of Post Office Administrator or Senior Post Office Administrator.

**ASSIGNING POST OFFICE ADMINISTRATOR ROLE:**

It is recommended that multiple people are assigned the Post Office Administrator role so that not just one person has this responsibility.

By doing this, they will also be able to view and search for all Access Requests in the Post Office (Section 4.1).

An Access Request appears in the Post Office immediately after the school submits it. There is only one Post Office and an officer will only see those Access Requests related to Principal Networks to which they have access.

**Assign P1 to Clearing House**

The Post Office Administrator assigns Priority 1 (P1) of the Access Request to the appropriate Clearing House. It is here in the Clearing House where most of the management of the Access Request is done.
Statuses

The Access Request Status when first received in the Post Office is *Submitted*. The Status will change to *In Progress* once it is assigned to the Clearing House.

Actions

The Post Office Administrator can *Transfer to another Educational Services area*, *Withdraw* the Access Request or *Upload an Attachment* in the Post Office before the Access Request P1 is assigned to a Clearing House (that is, while the Access Request has a *Submitted* status).

Main Point of Entry

The Post Office is the main point of entry for Access Requests. For example:

- When an Access Request is resubmitted by a school after a *Return to School* Action, it will be delivered to the Post Office. It will always go through the Post Office, not directly back to the Clearing House.
- When an Access Request is actioned as *Transfer to another Post Office*, it will be delivered first to the new Post Office.

Chapter 6 explains in further detail the processes and actions available under the Post Office.

Stage 2: Clearing Houses: Before the Panel

Clearing Houses are managed by *Clearing House Coordinators*. 
ASSIGNING PRIORITIES:

An Access Request can have up to three Priorities (referred to in this Guide as P1, P2 or P3).

A Clearing House Coordinator may assign P1 to the Panel and only explore P2 and P3 (if applicable) if P1 is not Supported; or they may assign all Priorities at once. This is up to local processes.

A priority must be assigned to a Clearing House before it can be assigned to a panel. It can be assigned to the same or a different Clearing House.

Clearing House Coordinator (AR/P1 Owner)

The Post Office Administrator assigns P1 of the Access Request to the Clearing House. The Coordinator of this Clearing House will become the Owner of the Access Request (referred to in this Guide as the Clearing House Coordinator (AR/P1 Owner)).

Throughout this process, the CHC (AR/P1 Owner) may Transfer to another Principal Network within their Educational Services area or Post Office, Withdraw, Return to School for further information, or Request Return to Clearing House (from the Panel prior to meeting or while priority is still in draft). They will make final determinations for the Access Request and will take most actions before and after Panel input.

Assign P2, P3 to Clearing House

The CHC (AR/P1 Owner) assigns P2 and P3, if applicable, to the appropriate Clearing House (either themselves or another Clearing House). They may also reassign P1 to a different Clearing House if it has been assigned in error.

Clearing House Coordinator (P2, P3)

Clearing House Coordinators assigned to P2 and P3 (referred to in this Guide as Clearing House Coordinator (P2, P3)) can request a Transfer to another Principal Network or Post Office (by email to Clearing House Coordinator (AR/P1 Owner), Withdraw or Return to School, but the CHC (AR/P1 Owner) will action it at their discretion. They can also Request Return to CH from the Panel of their priority or Upload Attachments. The Clearing House Coordinator (P2, P3) can also reassign the Priorities assigned to them to another Clearing House if they have been assigned in error.
Assign to Panel

All Clearing Houses Coordinators will then assign their Priorities to Panels, to the Interim (Emergency) Panel (ongoing) a Pre-Panel meeting or a Statewide Panel depending on local processes.

The processes and Actions available under the Clearing House before the Panel are explained in further detail in Chapter 8.

2.3.1. Stage 3: Panels

The Panel accesses student eligibility, information presented in the Access Request and availability of resources. It will make a comment and a Priority Status recommendation of Supported, Deferred or Declined. When the Panel Priority Outcome is marked as completed, the priority/s will be automatically returned to the CHC (AR/P1 Owner) in the Clearing House to evaluate and review the Priority Statuses and make a final determination.

Types of Panels

- **Standard Panel**: Can involve one or more principal networks within one Educational Services area or across Educational Services areas. This panel will be created by Local Panel Administrator. A standard panel can also be a Statewide Panel. This panel is available to all principal networks. This panel will be created by a Statewide Panel Administrator. Panels usually have a life span of one term and have set start and end dates.

- **Pre-Panel Meeting**: A Pre-Panel Meeting may be established to review the Priorities before they are allocated to the individual standard Panels. From here, they will determine to which Panel the Priorities are allocated. A Pre-Panel Meeting can assess Priorities but must allocate to a Panel for Priority.

  A Pre-Panel Meeting is identified in lists with the symbol.

- **Interim (Emergency) Panel (ongoing)**: It is recommended that one or more principal networks establish an Interim (Emergency) Panel (ongoing) to allocate Priorities that require urgent and immediate attention. This panel can have a life span of one term, one semester or one year. The end date should be the last day of term, semester or year.
The processes and Actions available under the Panel are explained in further detail in Chapter 9.

2.3.2. Stage 4: Clearing Houses: after the Panel

Once an Access Request Priority is returned from a Panel, the CHC (AR/P1 Owner) will review each of the Priority Statuses and make final decisions on them.

**AND and OR PRIORITIES:**

An Access Request may have 1-3 Priorities (P1, P2, P3), which may be AND requests or OR requests. These Priority requests are explained in Section 10.5
Final Status of Priority

Based on the Panel determinations, the CHC (AR/P1 Owner) can adjust the final Status of the Priority:

- Supported: Remain Supported, or change to Supported (On Hold), Supported (No Further Action), or Deferred.
- Deferred: Remain Deferred, or change to Deferred (No Further Action).
- Declined: Remain Declined. There is no further action available for Declined priorities.

The Clearing House Coordinator (P2, P3) can view the Priority Statuses, but the CHC (AR/P1 Owner) will make all final determinations based on all Priorities under the Access Request.

The CHC (AR/P1 Owner) manages the workflow of the Access Request. They will only set the status as Completed or Declined once the Priority Statuses are reviewed and appropriate decisions have been considered and recorded.

The processes and Actions available under the Clearing House after Panel are explained in further detail in Chapter 10.
2.4. Roles and primary job functions

The following roles, assigned by a state officer in Learning and Support participate in the Panel Process:

<table>
<thead>
<tr>
<th>Role</th>
<th>Primary Job Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Office Administrator</td>
<td>• Receive Access Requests in the Post Office</td>
</tr>
<tr>
<td></td>
<td>• Assign P1 to a Clearing House</td>
</tr>
<tr>
<td></td>
<td>• Transfer to another Educational Services area, Withdraw, or run Reports</td>
</tr>
<tr>
<td></td>
<td>• Upload Attachments:</td>
</tr>
<tr>
<td></td>
<td>– Educational Services area attachments</td>
</tr>
<tr>
<td></td>
<td>– Allow school to upload an attachment</td>
</tr>
<tr>
<td>Senior Post Office Administrator</td>
<td>• As above</td>
</tr>
<tr>
<td></td>
<td>• In addition, receive emails as they relate to their Principal Networks</td>
</tr>
<tr>
<td></td>
<td>– transfer to and from Post Office and withdraw Access Request</td>
</tr>
<tr>
<td>Clearing House Administrator</td>
<td>• Set up Clearing Houses</td>
</tr>
</tbody>
</table>

**SCHOOL CAN CHECK PROGRESS:**

The school can view the progress of an Access Request and Priorities at any time through My Access Requests.
<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Clearing House Coordinator (AR/P1 Owner)      | • Manage their Clearing House  
• Assign their Priorities to Panels  
• Assign P2 and/or P3 to themselves or another Clearing House (depending on area processes)  
• Transfer, Withdraw, Return to School, Request Return to Clearing House or run Reports  
• Upload Attachments:  
  – Educational Services area attachments  
  – Allow school to upload an attachment  
• Review all Statuses of individual Priorities under the Access Request after the Panel and make final determinations  
• Communicate final determinations to stakeholders  
• Finalise the Access Request |
| Senior Clearing House Coordinator              | • As above  
• In additional, receive emails:  
  – Transfer to and from Post Office  
  – Transfer to another Clearing House  
  – SCAS registrations  
  – Return to Clearing House  
  – Return to school |
| Clearing House Coordinator (P2, P3)            | • Manage their Clearing House  
• Assign their Priorities to Panels  
• Upload Attachments:  
  – Educational Services area attachments  
  – Allow school to upload an attachment  
• Run Reports  
• Request for the CHC (AR/P1 Owner) to Transfer (email), Withdraw or Return to School  
• Request Return to Clearing House of their own priority from a Panel  
• View Statuses of individual Priorities after the Panel |
<p>| Local Panel Administrator                       | • Set up Panel including Pre-Panel Meeting and Interim (Emergency) Panels (ongoing) |</p>
<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panel Convenor</td>
<td>• Manage their Panels&lt;br&gt;• Organise Panel Meetings and Panel Members&lt;br&gt;• Assess and assign Statuses to individual Priorities&lt;br&gt;• Return Priorities with updated Statuses (Supported, Deferred or Declined) to Clearing House&lt;br&gt;• Run Reports&lt;br&gt;• Request for the CHC (AR/P1 Owner) to Transfer, Withdraw or Return to School&lt;br&gt;• Upload Attachments:&lt;br&gt;  – Educational Services area attachments&lt;br&gt;  – Allow school to upload an attachment</td>
</tr>
<tr>
<td>Panel Member</td>
<td>• Attend Panel meetings&lt;br&gt;• Participate in assigning Statuses of individual Priorities</td>
</tr>
<tr>
<td>Statewide Panel Administrator and Convenor</td>
<td>• Statewide function to set up Statewide Panel and organise meetings and members.</td>
</tr>
</tbody>
</table>
Chapter 3 - Getting started

3.1. Creating a shortcut link

Any DEC staff Member who has been granted access to the Panel Process (that is, assigned a role), will see Access Request Process under My applications in the DEC Portal. To include the program under Essentials, click Add to my Essentials. It is preferable that you access Panel Process this way, rather than going through the Access Request Process tab in ERN.

3.2. Your home screen

When you first open the Access Request Process, you will be greeted by the home screen. This will contain quick links, system updates and any news about the Panel Process.

You will also see up to five main navigation tabs at the top right hand side of your screen:

- Home
- Post Office
- Clearing Houses
- Access Request Panels
- Reports
Privileges are associated with each role, and they will determine what the user can and cannot see and do in the program.

Above the main tabs, all users will see their login name, a link to My Reports, My Profile, Log Off. A drop-down menu can take you to other programs such as ERN and its associated menu options, depending on your access privileges.

Anyone assigned all roles will see:

The Post Office Administrator will see:

The Clearing House Administrator and Clearing House Coordinator will see:

The Panel Administrator, Panel Convenor and Panel Member will see:

3.3. System features

3.3.1. Email and notifications

Email notifications are sent for major actions. They are noted in this Guide by the symbol.

Emails are also sent to your inbox whenever you process a report.

A table showing all email notifications is at Appendix 3.
3.3.2. Sorting and filtering search results

You can sort search results according to the heading filters. The process for searching for Priorities and Access Requests is detailed in Section 4. In most cases, search results are displayed in tables.

You can filter the results by any of the headings featuring the filter symbol:

![Filter symbol](image)

3.3.3. Spell checker

All multi-line text boxes have a spell check feature. Clicking the icon that appears under the text box (circled below) activates and allows use of the spell checker.

![Spell checker](image)

3.3.4. Character count

Where applicable, a character counter is visible next to comment boxes. It shows the maximum numbers of characters allowed in the text box and counts as you type.
Chapter 4 - Common tasks

There are a number of Common Tasks used throughout Access Request Process. Some differ slightly according to the role you have been assigned. The Common Tasks detailed in this Chapter include:

- Using Search Fields
- Viewing Details of a Priority/Access Request
- Selecting an Action
  - Return to School
  - Transfer to another Post Office
  - Withdraw a Access Request
  - Upload attachments
- Downloading Access Request PDF
- Extracting Data for Letters
- Generating Reports
- Downloading

4.1. Using search fields

4.1.1. Searching across all Access Requests

You can only search for Access Requests across all stages of the process under the Post Office. This can only be actioned by those assigned the Post Office Administrator role which is embedded in the profile of Learning and Engagement Coordinators, Advisors and Officers.

ASSIGNING POST OFFICE ADMINISTRATOR ROLE:

Assigning all users the Post Office Administrator role will allow them access to this global search function.

They will not necessarily be required to take Actions under the Post Office, but will have the ability to search globally.
4.1.2. Post Office: Searching by Access Request

Only those assigned the Post Office Administrator role can search under the Post Office tab.

**ACTION**

To search by Access Request under the Post Office, select Access Request at the top of the search field, then fill in the known data.

**VIEWING ALL AVAILABLE RESULTS:**

To view all available search results, you can just press Search without filling in any of the drop-down menu fields.

Note that this function under the Post Office will search Submitted Access Request Statuses as default. You can change this by selecting an option from the Access Request Status drop-down menu field.
SEARCH RESULTS

The search results will appear at the bottom of the screen. They will show a summary of the student details for each Access Request, including:

- Name, M/F, Scholastic Year and SRN
- Access Request status
- Priority 1
- Access Request: Principal Network
- Schools: Educational Services (that raised the Access Request)
- Schools: Principal Network (that raised the Access Request)
- School
- Submitted (date to Post Office)
- Raised by school or Principal Network
- Clearing House (current location of P1 such as Not Assigned or name of Clearing House to which it has been assigned)
4.1.3. Post Office: Searching by Student

Only those assigned the Post Office Administrator role can search under the Post Office tab.

**SEARCHING BY STUDENT:**

When searching by student, you must enter at least one field for any results to appear. This search function would be used when trying to locate an Access Request for a specific student.

**ACTION**

To search by student in the Post Office, select Student at the top of the search field, and fill in the known data.

**SEARCH RESULTS**

The search results will appear at the bottom of the screen and will show a summary of the student details.

4.1.4. Administer Clearing Houses: Searching for Clearing Houses

The Clearing House Administrator role can search for Clearing Houses under Administer Clearing Houses.
ACTION

Under the Clearing Houses >> Administer Clearing Houses tab, you can search for a specific Clearing House.

To search for a Clearing House, fill in the data on the Search Criteria page. The Clearing House Status drop-down menu on this search screen refers to the actual Clearing House, not the Priorities or Access Request.

SEARCH RESULTS

The search results will appear at the bottom of the screen and will show a summary of the Clearing House(s), including:

- Clearing House Name
- Short Name
- Start and End Dates
- Principal Networks (i.e. that relate to the Clearing House)
- Status of Clearing House
- Coordinators, that is, Name/s of Clearing House Coordinator/s
### 4.1.5. **My Clearing Houses: Searching by Access Request**

#### SEARCHING IN MY CLEARING HOUSES:

Search results will only appear for Access Requests and Priorities assigned to your Clearing House/s.

To search across all Access Requests, refer to Sections 4.1.2 and 4.1.3, which detail searching in the Post Office.

#### ACTION

Under the **Clearing Houses >> My Clearing Houses** tab, you can search for Access Requests currently in your Clearing House/s. Only those assigned the Clearing House Coordinator role can search under **My Clearing House** tab.

To search by Access Request under **My Clearing House**, select **Access Request** at the top of the search field, and fill in the known data.
You can select from a combination of any of the following drop-down menus:

- Principal Network
- School
- Calendar Year
- Access Request Status
- My Clearing House (the Clearing House/s for which you are Coordinator or for which you are a backup)
- Priority (P1, P2, P3)
- Priority Status
- (Provision Requested) Type of Support Class
- School Placement Type
- Outcome Category
- Outcome
- Outcome Reviewed

You can further tailor results with the following tick-boxes:

- Show only Access Requests with a Priority 1 having a status considered ‘Not Supported’
- Show only Access Requests transferred in

Specific detail and hints about searching under the Clearing Houses tab can be found under Sections 7 and 9.3.

SEARCH RESULTS

Search results will appear at the bottom of the screen and will show a summary of the student details for each Access Request, including:

- Name, M/F, Scholastic Year and SRN
- Access Request status
- Access Request: Principal Network
- School: Educational Services (that raised the Access Request)
- School: Submitted (date when submitted to Post Office)
- Details about P1, and P2 and P3 if they exist.
My Clearing Houses: Searching by Student

When searching by student, you must be able to complete at least one field for any results to appear. This search function would be used when trying to locate a specific Access Request for a student assigned to your Clearing House.

ACTION

Under the Clearing Houses >> My Clearing Houses tab, you can search for specific Access Requests.

To search by student, select Student at the top of the search field, and fill in known data.

SEARCH RESULTS

The search results will appear at the bottom of the screen and show a summary of the student details for each Access Request, including:

- Name, M/F, Scholastic Year and SRN
- Access Request Status
- School area, SEG and School
- When the Access Request was submitted to the Post Office
- Details about P1, and P2 and P3 if they exist
4.1.7. Panel Administration: Searching for Panels

Only those assigned the Panel Administrator or Panel Convenor roles can search for Panels under the Administer Access Request Panels tab.

**ACTION**

Under the Access Request Panels >> Administer Access Request Panels tab, you can search for a specific Panel.

To search for a Panel, fill in the data under the Search Criteria page.
SEARCH RESULTS

The search results will appear at the bottom of the screen and show a summary of the Clearing House(s), including:

- Panel Name
- Short Name
- Panel Type (Standard, Pre-Panel and ongoing)
- Statewide (Yes/No)
- Start and End Dates
- Principal Networks (associated with the Panel)
- Status of Panel
- Convenors (number)
- Members (number)
- Meeting Details

My Panels: Searching by Access Request

Search results will only appear for Access Requests and Priorities assigned to your Panel.

SEARCHING ACROSS ALL ACCESS REQUESTS:

To search across all Access Requests, refer to Sections 4.1.2 and 4.1.3, which detail searching in the Post Office.
ACTIONS
Under the Access Request Panels >> My Access Request Panels tab, you can search for specific Access Requests.

To search by Access Request under My Panels, fill in the known data.

SEARCH RESULTS
The search results will appear at the bottom of the screen and show a summary of the student details for each Priority, including:

- Name, M/F, Scholastic Year and SRN
- Access Request: Principal Network
- School: Educational Services
- School: Principal Network
- Priority (click for more detail)
- Provision Requested
- Priority Status
- Access Request Panel
- Outcome (whether Sections 1, 2 or 3 of the Panel Priority Outcome screen have been completed and whether the Outcome screen has been started, or whether it is in Draft.)
4.2. **Look up Principal Network**

On each screen a box entitled Principal Network appears. In this box all the Principal Networks to which you have access will appear.

To filter the Principal Networks you want to work with click the hour glass (Look up Principal Networks). The Principal Networks you have access to appear under My Principal Networks.
Use the arrow (e.g. move selection to right) to select the Principal Networks you currently wish to work on.

Then click Select Principal Networks.

4.3. Selecting an action

The Actions drop-down menu bar appears at the top and bottom of the search results table. It contains allowable Actions that are applicable to the search result items (such as Access Requests, Priorities, Panels or Clearing Houses).

An Action is initiated when a user selects an item(s) in the search results table by choosing from its tick-box, then selecting an Action item from the Actions drop-down menu.

To select an Action, you must first **always** tick one or more boxes.

You can select multiple entries to view at once in a list by ticking multiple boxes.
To select all the results in the list, tick the top tick-box. This will automatically select all entries in the list.

4.3.1. View Transfer history details

If an Access Request has been transferred from another Post Office or Principal Network, a symbol will appear. Click on it to view the transfer history.

4.3.2. View the Access Request verification screen

To view the verification screen of an Access Request, click on the blue hyperlink under the SRN column.

4.3.3. View attachments

Any attachments will be marked with a paperclip next to the student’s name. To view the attachment, click on the paperclip.
4.3.4. View Priority details

To view the details of the Priority under the Access Request, click on the blue hyperlink under the *Priority* column.

The following screen will appear, containing a summary of the Priority detail.

**SCHOOL TO UPLOAD ATTACHMENT:**

The icon means that a school has been allowed to upload an attachment. Once the attachment is uploaded by the school, it will appear here as a paperclip.
To view further detail, click on the History of Priority icon (which will exist if there is a history to retrieve).

If the Priority History Screen has a History of Outcome icon, click this icon to see the Historical Outcomes.

Whenever you see the History of Priority or History of Outcome icon (whether in Clearing House, Panel, Panel Outcome screen etc.), you can click the icon to see the Priority History and Historical Outcomes.

### 4.4. Selecting an Action Return to School

The Return to School option can be taken as an action or as a request by:

- **Post Office Administrator action as Return to School**
- **Action**: CHC (AR/P1 Owner) under My Clearing Houses
- **Request**: Clearing House Coordinator (P2, P3) in My Clearing Houses through Manage Priority Status
- **Request**: Panel Convenor in My Access Request Panels through Return to School Request
4.4.1. Post Office Administrator Action as Return to School

The Post Office Administrator can action an Access Request as Return to School under the Post Office tab if the Principal makes a request.

An email will be sent to the Senior Clearing House Coordinator and Assigned Principal. The process for withdrawing an Access Request is detailed in Section 4.6.

4.4.2. Clearing House Coordinator (AR/P1 Owner) Action Return to School

The CHC (AR/P1 Owner) can Action the Access Request to Return to School if a Priority needs further information or clarification.

**ACTIONS**

Under the Clearing Houses >> My Clearing Houses tab.

- Select student name/s (tick box).
- Select Return to School in drop-down menu under Actions.

The following screen will appear:

- Again, select the student name/s (tick box).
- Fill in Comments section with explanation for the Return to School then select Return.

The Access Request will now appear in the school's My Access Requests with a Validated status marked for their attention. Once the school has updated the Access Request, it will then be returned to the Post Office.

An email will be sent to the Assigned Principal with a cc to the Clearing House Coordinator.
RETURN TO SCHOOL AFTER PANEL:

If there is a Return to School Request before or during a Panel Meeting (only when the Panel Priority Outcome still has a Draft status), and the Access Request is resubmitted by the school, the Priority cannot be sent directly back to the same Panel (as this Panel is no longer available).

However, it is possible to:

- Assign the Priority to the Interim (Emergency) Panel (ongoing) for a decision.
- Assign the Priority to another available Panel.

4.4.3. Clearing House Coordinator (P2, P3) Return to School Request through Manage Priority Status

CLEARING HOUSE REQUEST

A Clearing House Coordinator (P2, P3) can request that a Priority under an Access Request Return to School. This request is sent to the Clearing House Coordinator (AR/P1 Owner), who will assess whether to pursue action.

ACTIONS

Under the Clearing Houses >> My Clearing Houses tab

- Select student name/s (tick box).
- Select Manage Priority Status in drop-down menu under Actions.

The following screen will appear:
- Again, select the student name/s (tick box).
- Select Return to School from the status pull down box.
- Fill in Comments section with an explanation.
- Select Save when completed.

The request for Return to School will then be sent to the Clearing House Coordinator (AR/P1 Owner), who will make a decision.

An email will be sent to the CHC (AR/P1 Owner) to assess the request.

### 4.4.4. Panel Convenor Return to School Request

**Panel Request**

A Panel Convenor can request that a Priority under an Access Request Return to School if the Panel Priority Outcome is in draft (that is, no outcome) or if it is prior to the Panel meeting. This request is sent to the Clearing House Coordinator (AR/P1 Owner), who will assess whether to pursue action.

**Actions**

Under the Access Request Panels >> My Access Request Panels tab.

- Select student name/s (tick box).
- Select Return to School Request in the drop-down menu under Actions.
- Again, select the student name/s (tick box).
- Fill in the Comments section with an explanation for the return. Click on Return.

An email will be sent to the Clearing House Coordinator (AR/P1 Owner).

### 4.5. Selecting an Action: Transfer

The Transfer to another Post Office option can be taken as an action or as a request: When the Access Request is actioned as Transfer to another Post Office, the Access Request will always be delivered to the new Post Office.

- **Action:** Post Office Administrator under the Post Office
- **Action:** CHC (AR/P1 Owner) under the Clearing House
- **Request:** Panel Convenor under the Access Request Panel through *Return to Clearing House*
- Email from Clearing House Coordinator (P2, P3) to CHC (AR/P1 Owner) requesting transfer of Access Request.

4.5.1. **Post Office Administrator Action Transfer to another Post Office**

The Post Office Administrator can transfer Access Requests to another Post Office through the Post Office only **before** it is assigned to a Clearing House.

**ACTIONS**

Under the *My Post Office* tab.
- Select student name/s (tick box).
- Select *Transfer to another Post Office* in drop-down menu under *Actions*.

The following screen will appear:

```
<table>
<thead>
<tr>
<th>Student name</th>
<th>School Principal Network</th>
<th>Current Principal Network</th>
<th>Transfer to...</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABCD</td>
<td>HCC9</td>
<td>HCC9</td>
<td>Please select.</td>
<td></td>
</tr>
</tbody>
</table>
```

- Again, select the student name/s (tick box).
- Select which Principal Network to transfer the Access Request.
- Fill in the *Comments* section with an explanation for the transfer.
- Then click on *Transfer*.
An email will be sent to the Senior Clearing House Coordinator at the new Principal Network with a cc to the Senior Clearing House Coordinator from the sending Principal Network.

4.5.2. Clearing House Coordinator (AR/P1 Owner) Action Transfer to another Post Office

CLEARING HOUSE

The CHC (AR/P1 Owner) can Transfer an Access Request to another Post Office where applicable.

All requests for transfer after the Access Request has left the Post Office will go to the CHC (AR/P1 Owner) to action.

ACTIONS

Under the Clearing Houses >> My Clearing Houses tab.

- Select student name/s (tick box).
- Select Transfer to another Post Office in drop-down menu under Actions.
The following screen will appear:

![Image of Transfer to another Post Office screen]

**ABILITY TO TRANSFER:**
If there is a tick box next to a student's name, that student can be transferred. If you are not the Clearing House Coordinator (AR/P1 Owner) of that Access Request, there will not be a tick box.

- Again, select the student name/s (tick box).
- Select to which Principal Network to transfer the Access Request.
- Fill in the Comments section with an explanation for the transfer.
- Then click on Transfer.

An email will be sent to the Senior Clearing House Coordinator at the new Principal Network with a cc to the Senior Clearing House Coordinator from the transferring area and the previous CHC (AR/P1 Owner).

### 4.5.3. Clearing House Coordinator (AR/P1 Owner) Action Transfer to another Clearing House

This action can only occur from the Clearing House to another Clearing House within the same Educational Services. If outside the Educational Services, use Actions: Transfer to another Post Office.

All requests for transfer after the Access Request has left the Post Office will go to the Clearing House Coordinator (AR/P1 Owner) to action.

**ACTIONS**

Under the Clearing Houses >> My Clearing Houses tab.

- Select student name/s (tick box).
- Select Transfer to another Clearing House in drop-down menu under Actions.
The following screen will appear:

- Again, select the student name/s (tick box).
- Select to which CH/Principal Network to transfer the Access Request.
- Fill in the Comments section with an explanation for the transfer.
- Then click on Transfer.

An email will be sent to the Senior Clearing House Coordinator at the new Clearing House with a cc to the Senior Clearing House Coordinator from the transferring Clearing House/Principal Network and the previous CHC (AR/P1 Owner).

An Access Request cannot be transferred to another Clearing House or another Post Office where any priority is marked as withdrawn or return to school. In these cases the AR with need to be returned to school to amend before a transfer can occur.
4.5.4. Panel Convenor Request **Transfer to another Post Office/Clearing House through Return to Clearing House**

**PANEL REQUEST**

A Panel Convenor can request that a Priority under an Access Request be transferred to another Post Office/Clearing House. This request is sent to the CHC (AR/P1 Owner) to action.

**ACTIONS**

Under the Access Request Panels >> My Access Request Panels tab.

- Select student name/s (tick box).
- Select *Return to Clearing House* in the drop-down menu under *Actions*.
- Again, select the student name/s (tick box).
- Fill in the *Comments* section with an explanation for the return. Click on *Return*.

An email will be sent to the CHC (AR/P1 Owner).

---

4.6. Selecting an Action: **Withdraw an Access Request**

An Access Request will generally only be withdrawn at the request of the school, parent(s) or carer(s). The *Withdraw an Access Request* option can be taken as an *action* or as a *request*:

- **Action:** Post Office Administrator under the Post Office
- **Action:** CHC (AR/P1 Owner) under the Clearing House
- **Request:** Clearing House Coordinator (P2, P3) under the Clearing House through *Manage Priority Status*
- **Request:** Panel Convenor under the Access Request Panel through *Return to Clearing House*

---

**WITHDRAW REMOVES ACCESS REQUEST:**

To *Withdraw an Access Request* will remove it from consideration. You will need to be sure before withdrawing the Access Request.
4.6.1. Post Office Administrator Action Withdraw Access Request

The Post Office Administrator can Withdraw Access Request through the Post Office only before it is assigned to a Clearing House. Once it is assigned to the Clearing House, the CHC (AR/P1 Owner) will action it as Withdraw Access Request.

ACTIONS

Under the My Post Office tab.

- Select student name/s (tick box).
- Select Withdraw Access Request in drop-down menu under Actions.
- Again, select the student name/s (tick box).
- Fill in Comments section with explanation for the withdrawal.
- Click on Withdraw.
- You will be asked if you are sure about the withdrawal decision; double check and if satisfied, click on OK.

An email will be sent to the Senior Clearing House Coordinator and Assigned Principal.

INACTIVE ACCESS REQUEST:

When the Access Request is actioned as Withdrawn, it is returned to the school’s My Access Requests with a Status of Withdrawn by Principal Network (Inactive).

The Access Request will no longer be part of Access Request Panel Process. The school can reactivate the Access Request within 12 month of its creation date. It can then be updated and submitted to the Post Office.
4.6.2. Clearing House Coordinator (AR/P1 Owner) Action *Withdraw*

**CLEARING HOUSE ACTION**

The CHC (AR/P1 Owner) will *Withdraw Access Request* when the school, parent(s) and/or carer(s) have requested a withdrawal. This may occur if, for example, the provision is no longer required or family has moved.

Under the Clearing Houses >> *My Clearing Houses* tab.

- Select student name/s (tick box).
- Select *Withdraw Access Request* in drop-down menu under *Actions*.
- Again, select the student name/s (tick box).
- Fill in *Comments* section with explanation for the withdrawal.
- Click on *Withdraw*.
- You will be asked if you are sure you would like to withdraw; double check and then click on OK.

An email will be sent to the Assigned Principal of the Access Request with a cc to the Senior Clearing House Coordinator.

4.6.3. Clearing House Coordinator (P2, P3) Request Withdraw through *Manage Priority Status*

**CLEARING HOUSE REQUEST**

A Clearing House Coordinator (P2, P3) can request that a Priority under an Access Request be withdrawn. This request is sent to the CHC (AR/P1 Owner). Whether it is withdrawn is decided by the CHC (AR/P1 Owner) after consultation with stakeholders. It may be that only one priority is withdrawn from consideration or the Access Request needs to be withdrawn.

**ACTIONS**

Under the Clearing Houses >> *My Clearing Houses* tab.

- Select student name/s (tick box).
- Select *Manage Priority Status* in drop-down menu under *Actions*.
The following screen will appear:

- Again, select the student name/s (tick box).
- Select Withdrawn.
- Fill in Comments section with an explanation.
- Select Save when completed.

The Withdrawn request will then be sent to the CHC (AR/P1 Owner) for decision.

An email will be sent to the CHC (AR/P1 Owner) to assess the request.

4.6.4. Access Request Panel Convenor Request Withdraw through *Return to Clearing House*

**ACCESS REQUEST PANEL REQUEST**

A Panel Convenor can request that a Priority under an Access Request be withdrawn. This request is sent to the CHC (AR/P1 Owner) for decision after consultation with stakeholders.

**ACTIONS**

Under the Access Request Panels >> My Access Request Panels tab.

- Select student name/s (tick box).
- Select *Return to Clearing House* in the drop-down menu under *Actions*.
The following screen will appear:

- Again, select the student name/s (tick box).
- Fill in the Comments section with an explanation for the return.
- Click on Return.

An email will be sent to the CHC (AR/P1 Owner).

4.7. Uploading Attachments

There are two ways to upload an attachment:

- Educational Services attachment
- Allow school to upload an attachment

The following roles can action *Upload an Attachment*:

- Post Office Administrator
- Clearing House Coordinator
- Access Request Panel Convenor

4.7.1. Uploading Educational Services Attachments

**ACTIONS**

Under the Post Office or *My Clearing Houses* or *My Access Request Panels* tab.

- Select student name/s (tick box).
- Select *Upload Attachment* in drop-down menu under *Actions*. 
• Again, select the student name/s (tick box).
• Select Educational Services attachment from the drop-down list under Upload an Attachment.
• Upload the file from your computer by selecting Browse … and then Attach.

The following confirmation message will appear:

A paperclip will now appear on the student record. To view the file, click on it.

The attachment should now appear.

To delete the attached file, select Delete.
A confirmation message will appear.

**EDUCATIONAL SERVICES ATTACHMENTS:**

These attachments can only be viewed and removed by Educational Services staff. If an Access Request is withdrawn or returned to school, the attachment/s is automatically removed.

4.7.2. **Allow School to Upload Attachment**

The school may be required to add an attachment to the Access Request.

**ACTIONS**

- Select student name/s (tick box).
- Select *Upload Attachment* in drop-down menu under *Actions*.
- Again, select the student name/s (tick box).
- Select *Allow School to Upload* from the drop-down list under *Upload an Attachment*.

The assigned Principal and the Author of the Access Request will be alerted by email that they are able to upload an attachment through *My Access Requests*.

**UNABLE TO EDIT ACCESS REQUEST:**

The school will not be able to edit any other part of their Access Request. It will only be able to upload an attachment.

The [ icon indicates that a school has been permitted to upload an attachment. Once it has uploaded the attachment, this symbol will disappear and an icon will replace it. (unless there was already an attachment) The attachment can be viewed as part of the *Access Request Process*. 
4.7.3. Viewing Attachments

Attachments can be viewed at any point by clicking on the icon.

The icon means that a school has been authorised to upload an attachment, but it has not yet done so.

4.7.4. Deleting Attachments

**ACTIONS**
- Click on the paperclip icon to view the attachment.
- The attachment should now appear.
- To delete the attached file, select *Delete*.
- A confirmation message will appear.

Any person who has access to a screen with the icon against a student can delete the non school attachment.

An attachment, uploaded on behalf of the school, cannot be deleted by any person outside the school.

The assigned principal or author can delete a school attachment if the Access Request has not yet been validated or if returned to the school for further work.

4.8. Download button

The *Download* button appears in:

- *Post Office*
- *Clearing Houses >> Administer Clearing Houses*
- *Access Request Panels >> Administer Access Request Panels*
- *Access Request Panels >> My Access Request Panels*
This *Download* button will reproduce the information listed on the screen in an Excel file. It is helpful when you would like to download onscreen search results into an Excel file for data collection.

**ACTIONS**

Search for Access Requests or any other type of search criteria.

The results will appear at the bottom of the screen.

Select student name/s (tick box).

Click on the *Download* button (located at the top and the bottom of the search results list).

The following prompt will appear:

Open or Save the Excel file.
4.9. Download Access Request PDF

From this field, you can access a PDF copy of the entire Access Request

**ACTIONS**

- Select student name/s (tick box).
- Select Download Access Request PDF in drop-down menu under Actions.
- A screen will appear indicating the PDF is scheduled.
- The report will be made available under *My Reports* tab and will also be emailed to you.

To view the report from *My Reports*, select the tick box and then press *Download*, or download the attachment directly from your email.

4.10. Extract Data for Letters

Data from an Access Request can be extracted into an Excel file for a mail merge in *Microsoft Office: Word* to create letters. How to use mail merge in *Microsoft Office: Word* is explained in *Appendix 5*.

The ability to Extract Data for Letters can be done from the Post Office, My Clearing House or the Reports tab (see *Section 11.6.11* for more detailed information about the Reports tab)

**ACTIONS**

Select student name/s (tick box).

Select *Extract Data for Letters* (either Post Office or Clearing House Letters) from drop-down menu under *Actions*.

If you have any saved criteria for extracting data, a screen will appear which will list all the previous criteria you have saved.

**SAVED CRITERIA UNDER A DIFFERENT TAB:**

If you have previously saved criteria under a different tab, for example, Report tab, it will not appear in this list.
4.10.1. Report criteria

To replicate the report criteria exactly:
Select the previously saved criteria report by ticking the tick-box and then selecting *Load Criteria*.

To slightly change the report criteria:
Select the previously saved criteria report by ticking the tick-box and then selecting *Load Criteria*.

From here, a window will appear from which you can select the additional fields you need. Tick the boxes of all the data you require for your correspondence.

If you want to save the criteria you selected for future correspondence, give the report a meaningful name, and select *Save Criteria*. Once you have saved the criteria, you can access it again through the Actions menu, *Extract Data for Letters*.

If you want to delete a Saved Criteria, select the report and select *Delete Criteria*.

4.10.2. Create a New Report

If you have *not* previously saved any criteria for extracting data, the following screen will appear:
To start a new report, select Create a New Report.

A window will appear in which you can choose the fields you need. You can either select all or tailor the selection for what is required a mail merge.

Give the report a meaningful name so that you can access it again.

NAMING REPORTS:

Be specific when you are naming reports. It makes it easier to find them again.

If you want to save the criteria you selected for future Correspondence, select Save Criteria. Once you have saved the criteria, you can access it again through the Actions menu, Extract Data for Letters.

If this is a one-off report style, select Extract.

To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.

Save the data as an Excel file.
4.11. Generate Report

Reports based on the Access Request data can be created under Generate Report. You can choose between:

- Access Request Summary
- Access Request Custom Report

4.11.1. Access Request Summary

The AR Summary Report creates a summary PDF, such as the following:

The Access Request Summary Report includes:

- Student information (such as SRN, Name, School etc)
- Status of Access Request and date the Access Request was submitted
- A summary of each Priority under the Access Request, including Clearing House, Access Request Panel, Priority Status and Priority Outcome Statuses
- A complete history of all Actions under the Access Request

If you want to be more specific about the data you want to extract, use Extract Data for Letters under the Reports tab.
**ACTIONS**

Only available under PO, my CH and my AR panels.

Select student name/s (tick box).

Select *Generate Report* in drop-down menu under *Actions*. Any previously saved criteria will appear but these saved criteria are not relevant to the *AR Summary* Report. This Report is automatically generated and does permit tailoring. To tailor a Report, select *AR Custom Report*.

Select *Create a New Report*.

A screen will appear in which you will be able to select between *AR Summary* or *AR Custom Report* from the Report drop-down menu:

In this case, select *AR Summary* and *Create Report*.

The report will be made available under *My Reports* tab and will also be emailed to you.

To view the report from *My Reports*, select the tick box and then press *Download*, or download the attachment directly from your email.

**4.11.2. Access Request Custom Report**

The Access Request Custom Report allows you to create Reports based on Access Requests with tailored fields. You can also *Save Criteria* and *Load Criteria* to reuse the parameters you selected for another Report date. Name the Report. Be specific so you can easily locate the report at a later time.

To create an Access Request Custom Report you can either:

- Create a new Report
- Save Report criteria for use again at a later date
- Load previously saved criteria.
**ACTIONS: CREATE A NEW REPORT**

- Select student name/s (tick box).
- Select *Generate Report* in drop-down menu under Actions.
- Click on *Create a New Report*, and
- Select Custom *Report* from the Report drop-down menu:

The following screen will appear:

![Custom Report Options](image)

This screen contains custom fields that you can select to add to your Report. The fields you can tick include:

- Student details (such as SRN, Name, Factor of Need and Disability Codes)
- School details
- Priorities (across Clearing House, Access Request Panel, Priority Status and Outcome)

Once you have ticked all the fields you require, click on *Create Report*.

The report will be made available under *My Reports* tab and will also be emailed to you.

To view the report from *My Reports*, select the tick box and then press *Download*, or download the attachment directly from your email. Save the data as an Excel file.
SAVE CRITERIA

Once you have ticked all the fields you require, you can click on Save Criteria.

A confirmation message will appear:

The criteria will be available to load at a later time.

LOADING PREVIOUSLY SAVED CRITERIA

- Select student name/s (tick box).
- Select Generate Report in drop-down menu under Actions.

The following screen will appear:

- On this screen, a previously saved criteria can be selected.
- Then click on Load Criteria.
- The selected Custom Report will appear on the screen:

From this screen, you can:
- Give the Report a different name
- Change the criteria by adding or removing tick-boxes
- If you changed the criteria, you can save that criteria as a new option by selecting Save Criteria.

Once you select Create Report, the report will be made available under My Reports tab and will also be emailed to you.

To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.
Chapter 5 - Assigning Roles and Access to Learning and Engagement Personnel

An officer from Disability, Learning and Support will assign specific profiles to Learning and Engagement Personnel in relation to the Access and Request Process.

The following roles will be embedded in the specific permission assigned to Learning and Engagement Coordinators, Learning and Engagement Advisors and Learning and Engagement Officers. Any other position will be given a specific permission as requested by the Learning and Engagement Coordinator or Learning Engagement Advisor. This will allow personnel to action and view all aspects of the Panel Process with their Principal Networks.

<table>
<thead>
<tr>
<th>Position:</th>
<th>Access to:</th>
<th>Roles:</th>
</tr>
</thead>
</table>
| Learning and Engagement Coordinator | All Principal Networks within the Educational Services area | Post Office Administrator  
Clearing House Administrator  
Clearing House Coordinator  
Local Panel Administrator  
Local Panel Convenor  
Local Panel Member |
| Learning and Engagement Advisor | Specific Principal Networks that relate to their Learning and Engagement Officers | Senior Post Office Administrator  
Clearing House Administrator  
Senior Clearing House Coordinator  
Local Panel Administrator  
Local Panel Convenor  
Local Panel Member  
Local Panel Convenor  
Statewide Panel Member |
| Learning and Engagement Officer | Specific Principal Networks | Post Office Administrator  
Clearing House Administrator  
Clearing House Coordinator  
Local Panel Administrator  
Local Panel Convenor  
Local Panel Member  
Statewide Panel Member |
| Any other positions to be advised | Specific Principal Networks | e.g. Local Panel Member backup  
Clearing House Coordinator |
Chapter 6 - Post Office

6.1. Workflow

The primary purpose of the Post Office is to receive all Access Requests from schools as part of the Educational Services area, and to then assign Priority 1 (P1) to the appropriate Clearing House. Only those assigned the Post Office Administrator role can see the Post Office tab.

When Access Requests are Submitted by the Assigned Principal, they automatically appear in their respective Post Office. Before the Post Office Administrator takes any actions, the Access Request has an Access Request Status of Submitted.
Once Submitted, Access Requests become available to Post Office Administrators to assign P1 of the Access Request to a Clearing House. After they have assigned P1, the Access Request Status automatically updates to In Progress and it is no longer available to action under the Post Office.

6.2. Post Office Administrator workflow

The flowchart below details the decision-making process for the Post Office Administrator when administering Access Requests in the Post Office. The Post Office Administrator takes a number of actions under the Post Office, described in this chapter and with a summary checklist in the Appendices at Appendix 4.
ASSIGNING POST OFFICE ADMINISTRATOR ROLE:

Assigning the Post Office Administrator role to all users will allow them access to this global search function. They will not necessarily take actions under the Post Office, but will be able to search and view.
6.3. Locating Access Requests in the Post Office

General search instructions are detailed under Common Tasks in Section 4.1.

The default search criteria on this Post Office page searches for Submitted Access Requests. These are Access Requests that have not yet been allocated by the Post Office and are still able to be actioned by the Post Office Administrator.

Searches for all Access Requests in the Access Request Process system can be made from this search page. To do this, you must change the Access Request Status field to All. Note that the search page defaults to searching for Submitted Access Requests.
6.4. Actions

6.4.1. Selecting an Action

The Actions drop-down menu lists all the actions available under the Post Office.

To select an action, you must first **always** tick the box for the Access Request(s)/Student(s). Multiple Access Requests at a time can be assigned to the same Clearing House. Just select more than one name (tick boxes) or select. You can select multiple entries to view at once in a list by ticking multiple boxes. To select all the results in the list, tick the top tick-box. This will automatically select all entries in the list. More detail is in Section 4.3.
6.5. Assign to Clearing House

The primary action of the Post Office is to assign P1 of an Access Request to a Clearing House.

**ACTIONS**

- Select student name/s (tick box).
- Select *Assign to Clearing House* in drop-down menu under *Actions*.
- The following screen will appear as a pop-up:

  ![Assign to Clearing House](image)

  - Again, select the student name/s (tick box).
  - Under the *Clearing House* drop-down menu, select the Clearing House.
  - Once you have selected the Clearing House, click on *Save*.
  - A confirmation screen will appear once your selection has gone through.

P1 of these Access Requests has now been assigned to the relevant Clearing House.
6.6. Common tasks under the Actions menu

The Post Office Administrator can take the following tasks, which are described in Chapter 4 Common Tasks.

<table>
<thead>
<tr>
<th>Action Menu Item</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer to another Post Office</td>
<td>Section 4.5</td>
</tr>
<tr>
<td>Return to School</td>
<td>Section 4.4.1</td>
</tr>
<tr>
<td>Withdraw Access Request</td>
<td>Section 4.6</td>
</tr>
<tr>
<td>Upload Attachment</td>
<td>Section 4.7</td>
</tr>
<tr>
<td>Download Access Request PDF</td>
<td>Section 4.9</td>
</tr>
<tr>
<td>Extract Data for Letters</td>
<td>Section 4.10</td>
</tr>
<tr>
<td>Generate Report</td>
<td>Section 4.11</td>
</tr>
</tbody>
</table>

6.6.1. Download button

The Download button appears in:

- Post Office
- Clearing Houses >> Administer Clearing Houses
- Access Request Panels >> Administer Access Request Panels
- Access Request Panels >> My Access Request Panels

This Download button will reproduce the information listed on the screen in an Excel file. This is helpful when you would like to download onscreen search results into an Excel file for data collection. For further details see Section 4.8.
Chapter 7 - Clearing Houses

7.1. Workflow

Most of the actions for an Access Request will occur by the Clearing House Coordinators (Clearing House Coordinators) under the Clearing House.

The following diagram shows a summary of the actions under the Clearing House.

![Diagram showing workflow process]

- Assign P2, P3 to themselves or other CH
- Assign Priorities to Panel
- Transfer, Withdraw, Upload Attachment, Return to School or Request Panel return priority to CH
- Assess Priority Statuses back from Panel Finalise Priority Statuses and AR Status
- Communicate final decision to stakeholders
- CHC P2, P3
- Assign Priorities to Panel
- Request CHC (AR/P1 Owner) to Transfer, Withdraw, Return to School or Request Panel to Return priority to CH

SCHOOL -> POST OFFICE -> CLEARING HOUSES -> ACCESS REQUEST PANELS
7.2. Allocating Priorities

An Access Request can have up to three Priorities – P1, P2, P3. There will always be a P1 (allocated by the Post Office Administrator to the CHC (AR/P1 Owner)).

Priorities 2 and 3 (if applicable) may be allocated to Clearing Houses by the CHC (AR/P1 Owner). For example, all the Priorities could go to the same Clearing House; they may be allocated to different ones, or not allocated until a decision is made about Priority 1. This depends on the Priority and local processes. The diagram below offers an example of splitting up an Access Request into Priorities.

AR1 contains one Priority:
- P1 is assigned to Clearing House A by the Post Office Administrator through the Post Office.
- The Coordinator of Clearing House A becomes the CHC (AR/P1 Owner) of AR1.

AR2 contains three Priorities:
- P1 is assigned to Clearing House B by the Post Office Administrator through the Post Office.
- The Coordinator of Clearing House B becomes the CHC (AR/P1 Owner) of AR2.

AR 3 contains two Priorities:
- P1 is assigned to Clearing House C by the Post Office Administrator through the Post Office.
- The Coordinator of Clearing House C becomes the CHC (AR/P1 Owner) of AR3.
7.3. Clearing House Coordinator overview

Each Clearing House has a Clearing House Coordinator. Generally, with a back-up of another coordinator (assigned to the Clearing House in the setting up of Clearing Houses by the Clearing House Administrator), they manage their individual Clearing House.

The Clearing House Coordinator can have two different functions:

1. **Clearing House Coordinator (CHC AR/P1 Owner)**, is assigned P1 of an Access Request, and makes final actions and decisions across the Access Request.
2. **Clearing House Coordinator (P2, P3)**, offers recommendations and input into the process.

After reviewing the information contained in the Access Request, the Priority (or Priorities) is assigned to a Panel, which then meets and decides on the Status of each Priority. The Clearing House Coordinator CHC (AR/P1 Owner) evaluates all the Priority Statuses under an Access Request and makes a final determination.

The Clearing House Coordinator takes the actions described in Appendix 4.4.1.

This Guide addresses the actions under the Clearing Houses in two sections:

- Chapter 8: Clearing Houses: Before the Panel
- Chapter 10: Clearing Houses: After the Panel

7.4. Clearing House Administrator: Creating a Clearing House under Administer Clearing Houses tab

7.4.1. Naming Clearing Houses

There can be one or multiple Clearing Houses within Principal Networks. The local team can decide how many Clearing Houses are required and how to name them. They can be organised according to:

- **Geography**: That is, by location.
- **Services**: Such as support classes, Integration Funding Support.
- **Other**, depending on local processes.

The setting up of Clearing Houses is done by the Clearing House Administrator under the Administer Clearing Houses tab. The Clearing House Administrator takes the actions as described in Appendix 4.
Clearing Houses are generally ongoing (not limited to a calendar year) and can be edited (Section 7.4).

7.4.2. Locating Clearing Houses: Administer Clearing Houses

General search instructions are detailed under Common Tasks in Section 4.1.4.

**ACTIONS**

Select Clearing Houses >> Administer Clearing Houses tab.

This will take you to the following page. Your Principal Networks will automatically appear.

The search parameters available to you are:

- Principal Networks using lookup screen (see Section 4.2)
- Clearing House Name
- Clearing House Short Name
- Clearing House Status
- Clearing House Coordinator.
Fill in the known fields and select Search.

The search results will appear at the bottom of the screen.

VIEWING ALL AVAILABLE ENTRIES:
To view all results, just press Search without pre-selecting any fields.

7.4.3. Creating a new Clearing House

The **Clearing House Administrator** creates new Clearing Houses.

**ACTIONS**
Under Clearing Houses >> Administer Clearing Houses tab.

Click on Create a Clearing House on the bottom left hand side of the page. Your Principal Networks will be automatically selected. Use the selection hour glass to select which Principal Networks can be referred to this Clearing House. Principal Networks under Other Selected Principal Networks can only be added/edited by a Clearing House Administrator with access to these Principal Networks.
The screen to create the new Clearing House will then appear.

![Clearing House Administration screenshot](image)

Fill in all the required fields.

**START AND END DATES:**

All Start and End Dates are **inclusive.** Clearing Houses generally last until 2999.

Select **Create** at the bottom right hand corner.

The status of the Clearing House will default to **Draft.**

Then press **Close.**
IMPORTANT: Making the Clearing House Available

To make the Clearing House Available, you must update the Clearing House Status.

To do this, use the Search Criteria search for the new Clearing House under Administer Clearing Houses. Click on the Clearing House to edit details.

From here, you can change the Clearing House status to Available.

Select Save when completed.
7.4.4. Editing details of Clearing Houses

Clearing House details can only be edited under Administer Clearing Houses by the Clearing House Administrator.

**ACTIONS**

Under Clearing Houses >> Administer Clearing Houses tab.
- Search for the Clearing House.
- Click on the Clearing House you wish to edit.
- Edit details as required.
- Select Save when completed.

7.4.5. Cancelling a Clearing House

A Clearing House may be cancelled if it was set up in error or if it is not required, as long as no priorities have ever been assigned to it.

**ACTIONS**

Under the Administer Clearing Houses >> My Clearing Houses tab.
- Search for the Clearing House.
- Click on the Clearing House to edit details.
- From here, you can change the Clearing House status to Cancelled.
- This will cancel the Clearing House.
- Click on Save.

7.4.6. Completing a Clearing House

If a Clearing House is no longer required and it does not contain any Priorities, its status can be changed to Completed.

7.5. Clearing House Coordinator: My Clearing Houses

General search instructions are detailed under Common Tasks in Section 4.1.5.

7.5.1. Searching by Access Request

**ACTIONS**

Under the Clearing Houses >> My Clearing Houses tab.
To search by Access Request under My Clearing Houses, select Access Request at the top of the search field, and fill in the known data.

You can select from a combination of any of the following menus:

- Principal Network
- My Clearing Houses
- School
- Calendar Year
- Access Request Status
- My Clearing House (which shows the Clearing Houses of which you are Coordinator)
- (All, P1, P2, P3)
- Priority Status
- (Provision Requested) Type of Support Class
- School Placement Type
- Outcome Category
- Outcome
- Outcome Reviewed

You can further tailor results with the following tick-boxes:

- Show only ARs with a Priority 1 having a status considered ‘Not Supported’
- Show only ARs transferred in
SEARCH RESULTS

The search results will appear at the bottom of the screen and will show a summary of the student details for each Access Request, including:

- Name, M/F, Scholastic Year and SRN
- Access Request status
- Access Request: Principal Network
- School: Educational Services (that raised the Access Request)
- School: Submitted (date when submitted to Post Office)
- Details about P1, and P2 and P3 if they exist.

7.5.2. Searching by Student

ACTIONS

Under Clearing Houses >> My Clearing Houses tab.

To search by student, select Student at the top of the search field, and fill in the known data. The search results will appear at the bottom of the screen and will show a summary of the student details for each Access Request.
7.5.3. Viewing transferred Access Requests

If an Access Request has been transferred, a symbol will appear. Click on it to view the transfer history. (also Section 4.3.1)

![Image of Access Request Process]

7.5.4. Viewing the Access Request Verification or Attachments

To view the full text of an Access Request, click on the blue hyperlink under the SRN column. Any attachments will be marked with a paperclip next to the student’s name. To view the attachment, click on the paperclip. (also Sections 4.3.2 and 4.3.3)

![Image of Access Request Process with paperclips]

**SCHOOL TO UPLOAD ATTACHMENT:**

The icon means that a school has been allowed to upload an attachment. Once the attachment is uploaded by the school, it will appear as a paperclip (unless there was already an attachment).

7.5.5. Viewing Priorities: quick view screen summary

A quick visual reference details the current status of the different priorities under an Access Request.
For a screen summary of each priority, hover your cursor over the priority ‘dot’.

Key information will appear, such as the priority request, the assigned Clearing House and Access Request Panel, the Priority Status and the Outcome Status.

To view more detail, click on the dot  and the following box will appear:

Note that this is similar to the information that appeared when you hovered over the dot, except you can:

- Select the symbol next to the priority detail for more information
- Click on the Outcome Status for more information.

7.5.6. Viewing Priority details

To view the details of the Priority under the Access Request, click on the blue hyperlink under the Outcome Status for a screen summary of each priority. (also Section 4.3.4)
Select the symbol  next to the priority detail for more information. Whenever you see the History of Priority icon (whether in Clearing House, Access Request Panel, Access Request Panel Outcome screen etc.), you can click the icon to see the Priority History and Historical Outcomes.

The following screen will appear, containing a summary of the Priority detail:

To view further detail, click on the *History of Priority* icon (if applicable)

If the Priority History Screen has a History of Outcome icon , click on it to see the Historical Outcomes.
Chapter 8 - Clearing Houses: Before the Access Request Panel

8.1. Workflow

This diagram details the Clearing House processes before the Access Request Panel.

CLEARING HOUSES:

An overview of Clearing Houses is detailed in Chapter 7.

Clearing Houses: After the Access Request Panel is detailed in Chapter 10.

The main functions of the Clearing House Coordinators before the Panel are:

- **Assign Priorities to Clearing House**: CHC (AR/P1 Owner) to assign P2 and P3, if applicable, to a Clearing House, depending on local processes; reassign P1 to another Clearing House if sent in error.
- Clearing House Coordinator (P2, P3): reassign their priority/s to another Clearing House if sent in error.
- **Assign Priorities to Panels**: Each Clearing House Coordinator to assign their Priorities to the appropriate Panel (to a standard Panel, the Pre-Panel Meeting or an Interim (Emergency) Panel (ongoing), as applicable)
- **Other Actions**: CHC (AR/P1 Owner) to assess whether to Return to School, Transfer to another Post Office or Clearing House or Withdraw (if the school and parents/carers have requested). Note the Clearing House Coordinator (P2, P3) will request a Return to School, Transfer to another Post Office, transfer to another Clearing House or Withdraw through the Action Manage Priority Status, and the CHC (AR/P1 Owner) will assess whether to pursue the action.
8.1.1. Clearing House Coordinator (AR/P1 OWNER) workflow

The CHC (AR/P1 Owner) is the Clearing House Coordinator assigned to P1 of an Access Request by the Post Office Administrator in the Post Office. This flowchart details the decision-making process of the Clearing House Coordinator (AR/P1 Owner).
8.1.2. Clearing House Coordinator (P2, P3) workflow

The flowchart below details the decision-making process of the Clearing House Coordinator (P2, P3).

8.2. Actions

8.2.1. Selecting an Action

The Actions drop-down menu lists all of the actions available under the My Clearing Houses tab.
To select an action, you must first always tick the box for the Access Request(s)/Student(s). Multiple Access Requests can be assigned to the same Clearing House at a time. Just select more than one name (tick boxes) or select. You can select multiple entries to view at once in a list by ticking multiple boxes. To select all the results in the list, tick the top tick-box, which will automatically select all entries in the list. See Section 4.1 for more detail.

8.3. Using search filters to locate Access Requests in *My Clearing Houses*

The search filters under the *My Clearing Houses* tab locate Access Requests that fit specific criteria. To limit searching through lines of returned data, filters can separate Priorities before and after the Panel.

**Before the Access Request Panel**

For more specific results, more filters can be used:

- **Type of Support Class**: These options relate to the Support Classes (SCAS) in regular schools as identified in the *Provision Requested* section of the Access Request by the School Learning and Support Team
- **School Placement Type**: Includes the subcategories across itinerant programs, support classes in special schools, distance education support unit and centre as identified in the *Provision Requested* section of the Access Request by the School Learning and Support Team
- **Priority**: 1, 2 or 3
- **Clearing House**: Select a specific Clearing House if you have access to more than one
- **Priority Status**: Searches by Priority Status. For example you may wish to search for only *Assigned to Clearing House Priorities*

*Type of Support Class* and *School Placement Type* are mutually exclusive filters. They may relate to provisions requested by the School Learning and Support Team on the *Provision Requested* section of the Access Request.
Options available within each filter for Type of Support Class and School Placement Type are:

<table>
<thead>
<tr>
<th>Type of Support Class</th>
<th>School Placement Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autism</td>
<td>IT – Vision</td>
</tr>
<tr>
<td>Emotional Disturbance</td>
<td>IT – Hearing</td>
</tr>
<tr>
<td>Behaviour Disorder</td>
<td>Integration Funding Support</td>
</tr>
<tr>
<td>Hearing Impaired</td>
<td>SSC – Behaviour Disorder</td>
</tr>
<tr>
<td>Intellectual Disability (IM)</td>
<td>SSC – Intellectual Disability (IO/IS)</td>
</tr>
<tr>
<td>Intellectual Disability (IO)</td>
<td>SSC – Intellectual Disability (IS)</td>
</tr>
<tr>
<td>Intellectual Disability (IO/IS)</td>
<td>SSC – Intellectual Disability (ID/ED)</td>
</tr>
<tr>
<td>Intellectual Disability (IO/AU)</td>
<td>SSC – Emotional Disturbance</td>
</tr>
<tr>
<td>Multi Categorical</td>
<td>SSC – Physical</td>
</tr>
<tr>
<td>Physical</td>
<td>SSC – Multi Categorical</td>
</tr>
<tr>
<td>Vision Impaired</td>
<td>SSC – Deaf Blind</td>
</tr>
<tr>
<td>Tutorial</td>
<td>DE – Support Unit</td>
</tr>
<tr>
<td>Early Intervention</td>
<td>DE – 2.8 (Students with additional learning and support needs)</td>
</tr>
<tr>
<td></td>
<td>DE – 2.9 (Students with significant support needs – transition)</td>
</tr>
<tr>
<td></td>
<td>IT – Early Intervention</td>
</tr>
<tr>
<td></td>
<td>IT – Resource, Early Intervention</td>
</tr>
</tbody>
</table>

(Note: SSC refers to Special School/Centre)

Priority Status Filter

Using the filter drop-down menu Priority Status means you can search for Priorities at different stages in the Access Request Process.

Options available within this filter:

- All, Assigned to Clearing House; Assigned to Panel; Return to School; Return to Clearing House; Deferred; Supported; Declined; Supported (On Hold); Supported (No Further Action); Deferred (No Further Action)

There are two other search options with a check box

- Show only ARs with a priority 1 having a status considered Not Supported
- Show only ARs transferred in

The drop-down menus Outcome Category and Outcome are not relevant to processes before the Panel. When searching under the Clearing House for Priorities before they are sent to the Panel, they should remain on their default setting of All and No Outcome / Completed Outcome.
After the Panel

This is described in Section 10.3.

8.4. Clearing House Coordinator (AR/P1 Owner): Assign Priorities to Clearing Houses

This section applies to the CHC (AR/P1 Owner) only.

The CHC (AR/P1 Owner) assigns the other Priorities (if applicable) to themselves or another Clearing House, depending on local processes. Each Priority under an Access Request may end up in the same Clearing House or be directed to different ones.

Access Requests can have a maximum of three priorities:

- **P1**: Is the first priority considered and the focus of the Access Request.
- **P2/P3**: These Priorities may not be addressed if P1 is supported. Depending on local processes, the CHC (AR/P1 Owner) will decide whether to assign the Priority/s to the suitable Clearing House, their own or another. On the other hand, they may not assign P2 and P3 to a Clearing House until a determination has been made for P1.

**ACTIONS**

Under the Clearing Houses >> My Clearing Houses tab.

- Select student name/s (tick box).
- Select Assign Priorities to Clearing House
- The following screen will appear:

  ![Assign Priorities to Clearing Houses](image)

- Again, select the student name/s (tick box).
- From here, you can assign a Priority to a Clearing House at the top of the screen using the Bulk Assignment option or under each student's individual details.
- Select Save when completed.
8.5. Clearing House Coordinator (P2, P3): reassign Priority/s to Clearing Houses

This section applies to the **Clearing House Coordinator (P2, P3)** only.

A Clearing House Coordinator can reassign their Priority to any Clearing House in their Educational Services area. This may be when a Priority has been assigned in error.

- P1 Owner can reassign P1
- P2 Clearing House Coordinator can reassign P2
- P3 Clearing House Coordinator can reassign P3

This is actioned under the **Clearing Houses >> My Clearing Houses** tab

- Select student name/s (tick box);
- Select Assign Priorities to Clearing House
- Again, select the student name(s)
- Assign Priority to a Clearing House
- Select Save when completed.

8.6. Assign Priority/s to Panels

This section applies to **all** Clearing House Coordinators.

The Panel is where the Panel Convenor, along with Panel Members, makes recommendations based on each Priority. The Clearing House Coordinator will assign each Priority to the most appropriate Panel, the Pre-Panel Meeting or the Interim (Emergency) Panel (ongoing), if applicable, according to local processes.
ASSIGNING PRIORITIES:

Priorities in search lists that have not been allocated to a Panel will not have an arrow (left or right facing) on their dot under the Priority screen summary in the far right columns:

ACTIONS

Under the Clearing Houses >> My Clearing Houses tab.

- Select student name/s (tick box).
- Select Assign Priorities to Panels in drop-down menu under Actions.
- The following screen will appear:
• Again, select the student name/s (tick box).
• From here, you can assign a Priority to a Panel at the top of the screen using Bulk Assignment or under each student’s individual details.
• Select Save when completed.

You are only able to take actions when the tick box appears. If the tick boxes are not available, it is because the Clearing House Coordinator is not assigned to that Priority and so cannot action it.

In the My Clearing Houses screen the student will now have a right-facing arrow next to their Priority in the far right columns, indicating that they have been assigned to a Panel.

8.6.1. **Assign Hearing and Vision Priorities to Panel**

As part of the Clearing House process, the Clearing House Coordinator assesses the Access Request and then assigns it to an appropriate local Panel.

If a panel or indeed the Clearing House Coordinator (in discussion with the senior Clearing House Coordinator) determines that the level of itinerant support is outside the maximum recommended guidelines (refer to the Hearing and Vision Guidelines see Appendix 2.2 and 2.3) the access request can be assigned to the statewide hearing/vision panel. If the Access Request is in the Clearing House, under Actions select Assign Priorities to Access Request Panels and select the appropriate Panel.

If the Access Request is in the panel with no panel outcomes under Actions, select transfer to another Panel and select the appropriate Statewide Panel.

A priority can only be transferred by the Panel Convenor

• before the panel meeting start date, or
• if in the Panel, and there is no Access Request Panel Priority Outcome such as completed or draft; only Close has been selected.
If a priority status is marked as deferred and the Priority Outcome as completed, the Clearing House Coordinator is able to reassign this priority to a Statewide Panel. In the comments section, the Panel Convenor is able to indicate that the priority is to be reassigned to the Statewide Panel with a reason.

8.7. Clearing House Coordinators (P2, P3) Withdraw or Return to School Requests through Manage Priority Status

This section applies to Clearing House Coordinators (P2, P3) only. (also Sections 4.4.3 and 4.6.3)

When P2 or P3 has been assigned to a Clearing House, but not yet to a Panel, the Clearing House Coordinator (P2 and P3) can send a request to the CHC (AR/P1 Owner) that a Priority needs to be Withdrawn, or Return to School

This request is made through the Manage Priority Status action. This will be shown as a Priority Status for that Priority, and will be reviewed by the CHC (AR/P1 Owner) to assess whether to pursue action.
ACTIONS

Under the Clearing Houses >> My Clearing Houses tab.

- Select student name/s (tick box).
- Select Manage Priority Status in drop-down menu under Actions.
- Again, select the student name/s (tick box).
- Select: Withdrawn, or Return to School.
- Fill in Comments section with an explanation.
- Select Save when completed.

The Withdrawn or Return to School request will then be sent to the Clearing House Coordinator (AR/P1 Owner), who will assess whether to pursue action.

An email will be sent to the CHC (AR/P1 Owner) and Assigned Principal of the Access Request.

8.8. Clearing House Coordinators Request Return to Clearing House from the Panel

This section applies to all Clearing House Coordinators.

All Clearing House Coordinators can request the return of their own Priority from a Panel; the CHC (AR/P1 Owner) can request return of any Priority from a Panel. These can only be actioned by the Panel Convenor prior to a Panel Meeting or where the Priority Outcome Status is Draft.

This may be done for example, if a higher order Priority has a supported Priority status and it is known that the stakeholders will accept it. It may be decided that it is not necessary to proceed with the other Priority/s.

ACTIONS

Under the Clearing Houses >> My Clearing Houses tab.

- Select student name/s (tick box).
- Select Manage Priority Status in drop-down menu under Actions.
- Again, select the student name/s (tick box).
- Select under Status Return to Clearing House
- Select Save when completed.
An email will be sent to the Access Request Panel Convener/s.

8.9. Transfer to another Clearing House

This action can only be performed when the transfer is a clearing house within the same Educational Services. If the transfer is outside the Educational Services, then select Transfer to Another Post Office.

**ACTIONS**

Under the *Clearing Houses >> My Clearing Houses* tab.

- Select student name/s (tick box).
- Select *Transfer to another Clearing House*
- Again, select the student name/s (tick box).
- Select name of Clearing House.
- Fill in comments section with explanation.
- Select Save when completed.

An Access Request cannot be transferred to another Clearing House or another Post Office where any priority is marked as withdrawn or return to school. In these cases the AR with need to be returned to school to amend before a transfer can occur.
8.10. Common tasks

8.10.1. Under the Actions menu

The following tasks are described in the Common Tasks chapter:

<table>
<thead>
<tr>
<th>Action Menu Item</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return to School</td>
<td>Section 4.4</td>
</tr>
<tr>
<td>Transfer to another Post Office</td>
<td>Section 4.5</td>
</tr>
<tr>
<td>Withdraw Access Request</td>
<td>Section 4.6</td>
</tr>
<tr>
<td>Upload Attachment</td>
<td>Section 4.7</td>
</tr>
<tr>
<td>Download Access Request PDF</td>
<td>Section 4.9</td>
</tr>
<tr>
<td>Extract Data for Letters</td>
<td>Section 4.10</td>
</tr>
<tr>
<td>Generate Report</td>
<td>Section 4.11</td>
</tr>
<tr>
<td>Transfer to another Clearing House</td>
<td>Section 4.5.3</td>
</tr>
</tbody>
</table>
8.10.2. Download button

The *Download* button appears in:

- *Post Office*
- *Clearing Houses >> Administer Clearing Houses*
- *Access Request Panels >> Administer Access Request Panels*
- *Access Request Panels >> My Access Request Panels*

This *Download* button will reproduce the information listed on the screen in an Excel file. It is helpful when you would like to download onscreen search results into an Excel file for data collection. For further details see Section 4.8.
Chapter 9 - Access Request Panels

9.1. Workflow

The Panel considers each Priority assigned to it by examining:

- Student eligibility
- Availability of requested resources
- Information contained in the Access Request.

The diagram below reflects the processes under the Panel.
The Access Request Panel Convenor will facilitate the Access Request Panel Meeting, and each Panel Member will contribute to evaluating Access Request Priorities. Panel Convenors and DEC Panel Members can review their allocated Priorities and the Access Requests before the meeting through My Access Request Panels.

Panels will evaluate each Priority. When the Panel Status of a Priority has been marked as Supported, Deferred or Declined, and the status of the Panel Priority Outcome has been marked as Completed, it will be automatically made available back at the Clearing House (AR/P1 Owner).

9.1.1. Access Request Panel Administrator

The Access Request Panel Administrator creates Panels, as well as editing their characteristics, access and features. The Panel Administrator takes the actions as described in Appendix 13.4.

9.1.2. Access Request Panel Convenor Flowchart

The Access Request Panel Convenor takes most actions under the Panel.
This flowchart details the decision-making process of the Panel Convenor.

9.1.3. Access Request Panel Member

Access Request Panels are made up of a number of Panel Members who participate in making Priority decisions.

ACCESS REQUEST PANEL MEMBERS VIEW ONLY:

Panel Members can view and download information, review the content and contribute to panel meetings. They are not able to perform any of the Action functions.
9.2. Types of Panels

9.2.1. Standard Panels

These Panels are short-term; usually established for one term. A Panel remains active until all Priorities assigned to it have a Completed Outcome and are automatically back at the Clearing House.

9.2.2. Interim (Emergency) Panels (ongoing)

Interim (Emergency) Panels (ongoing) may be set up to manage any urgent Priority decisions or where an Access Request was sent back to a school for more information and resubmitted. Rather than wait until the next Panel meeting, the Priority is sent to the Interim (Emergency) Panel (ongoing) for determination.

Unlike Standard Panels, which are only set up to last for approximately one term, the Interim (Emergency) Panels (ongoing) are generally longer-term and last for a calendar year. They function in a similar way to other Panels.

When creating an Interim (Emergency) Panel (ongoing) the span between the Available Start Date and Available End Date is usually a calendar year.

Given that Priorities can only be allocated to a Panel prior to the Available End Date, it is recommended that an Interim (Emergency) Panel (ongoing) be set up as outlined in Section 9.3.2 so that Priorities can be considered in an ongoing way.

This panel is optional and follows local processes.

9.2.3. Integration Funding Support Panel

Integration Funding Support Panel may be set up in the same way as an Interim Emergency Panel with a name to identify it as an Integration Funding Support Panel. It can be set up for one term or longer. Priorities can be considered by the panel in an ongoing way.

9.2.4. Pre-Panel Meeting

A Pre-Panel Meeting may be created when Clearing Houses assign all Priorities to one Panel before assigning them to specific Placement Panels. This type of Panel is optional and up to the area processes.
When a Pre-Panel Meeting exists, the name is accompanied by a Pre icon: 🔄.

Unlike other Panels, the Pre-Panel Meeting will not take any Actions or determine the outcome of Priorities.

The Pre-Panel Convenor will use the same process as Transfer to Another Panel (Section 9.10.2) to assign Priorities to Panels.

9.3. Panel Administrator: Creating a Panel under Administer Access Request Panels tab

9.3.1. Naming Panels

There are generally multiple Panels within a group of Principal Networks. The number required and their naming is a local decision.

For example:

- **Geography**: Such as, by Principal Network
- **Services**: Support classes, itinerant vision/hearing etc.
- Other, according to local processes.

9.3.2. Creating Access Request Panels

The Panel Administrator is the only role that can create the Panel. Both the Panel Administrator and the Panel Convenor can edit Panel details.

This process refers to the creation of any Panel:

- Panel
- Interim (Emergency) Panel (ongoing), or
- Pre-Panel Meeting

**ACTIONS**

Under the Access Request Panels >> Administer Access Request Panels tab.

Note that the default page is the search criteria page.

Click on Create a Access Request Panel on the bottom left hand side of the page.
The screen to create a new Panel will then appear.

- Fill in all the required fields.
- Under Panel Type, select Standard, Ongoing or Pre-Panel Meeting.
- Available Start and End Dates: These dates refer to the period that priorities are able to be assigned to the Panel. The meeting dates would be at the minimum one day after the Available End Date.
- Select Create at the bottom right hand corner.
- A confirmation screen will appear.
- The status of the Panel will default to Draft.
- Click on Close.
Available Start and End Dates

For most Panels including Pre-Panel Meetings, the span between the Available Start Date and Available End Date is usually less than a term. This would depend on when the Panel meeting is held.

When creating an Interim (Emergency) Panel (ongoing), the span between the Available Start Date and Available End Date is usually a calendar year.

Priorities can only be allocated to a Panel prior to the Panel meeting. The Available End Date, entered when the Panel was first set up (this can be edited) is the date after which no additional priorities can be assigned to that Panel. The meeting date must occur after the Available End Date.

Interim (Emergency) Panel (ongoing)

Given that Priorities can only be allocated to a Panel prior to the Available End Date, it is recommended that an Interim (Emergency) Panel (ongoing) be set up as follows:

The Available Start and End Dates are entered for the calendar year up to the last week of the year. The meeting date is set for the last week of the year. This allows Priorities to be assigned to this (Emergency) Panel at any time and an unscheduled meeting can be called to manage any priorities. This unscheduled meeting can be called at any time when there is a Priority that requires immediate action.

IMPORTANT: Making the Panel Available

To make the Panel Available, you must update the Panel status. To do this, search for the new Panel under Administer Access Request Panels.

Click on the Panel to edit details.

From here, in the status pull-down box, the Panel status can be updated to Available.

Select Save when completed.

9.4. Edit Access Request Panel details

This section applies to Access Request Panel Administrators and Access Request Panel Convenors of Panels to which they are assigned as the convenor.
Panel details can be updated by the Panel Administrator or the assigned Panel Convenor, if required. This includes Meeting Dates, Times, Locations and editing Panel Members.

**ACTIONS**

Under the *Access Request Panels >> Administer Access Request Panels* tab.

- Locate the Panel through the search screen.
- Fill in the known fields and press *Search*.
- The search results will appear at the bottom of the screen.
- Select the Panel by clicking on the name.
- From here, you can edit any fields including *Available End Date*, *Meeting Details*, as well as *Manage Members*.
- Select *Save* when completed.

### 9.5. Cancelling a Panel

This section applies to *Access Request* Panel Administrators and *Access Request* Panel Convenors of Panels to which they are assigned as the convenor.

Cancelling a Panel will only occur if the Panel is not required or was created in error.

**ACTIONS**

Under the *Access Request Panels >> Administer Access Request Panels* tab.

- Locate the Panel through the search screen.
- Fill in the known fields and press *Search*.
- The search results will appear at the bottom of the screen.
- Select the Panel by clicking on the name.
- Change to the Status from *Available* to *Cancelled*.
- Select *Save* when completed.

### 9.6. Adding Access Request Panel Members

Panel Members are usually added to each Panel. This is generally done by the *Access Request* Panel Convenor.
ADDITION NEW MEMBERS:

Members can only be added to Panels up to the end of the Meeting date and the Panel must be available.

ACTIONS

Under the Access Request Panels >> Administer Access Request Panels tab.

- Locate the Panel through the search screen.
- Fill in the known fields and press Search.
- The search results will appear at the bottom of the screen.
- Select the Panel by clicking on the name.
- The status of the panel must be available and saved.
- From here, select Manage Members.

The following screen will appear:

VIEW MEMBERS:

You can only manage Members if you are the Access Request Panel Administrator or Panel Convenor of the particular Panel. Otherwise, View Members will appear instead of Manage Members.
9.6.1. Adding NSW Department of Education and Communities Coordinator Staff as Panel Members

Under Member Type, DEC Staff appears as the default.

You can either Search for DEC Staff or add their details to the required fields.

If you Search for DEC Staff, the fields will automatically populate once you have selected the DEC staff Member from the search list.

The following fields are mandatory or optional to complete if you do not Search for the DEC Staff or you select non DEC.

<table>
<thead>
<tr>
<th>Field</th>
<th>Mandatory Field</th>
<th>Optional Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Name</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Work Phone</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

Once the fields have been filled in, select Add Member.

New Panel Members can be marked to receive email advice.

9.7. Adding a Panel Meeting: date, time and location

Panel Meeting details will sometimes need to be updated. Members are automatically informed by email.

**ACTIONS**

Under the Access Request Panels >> Administer Access Request Panels tab.

Locate through the search screen the Panel for which you are creating the meeting.

Fill in the known fields and press Search.
The search results will appear at the bottom of the screen.

Select the Panel by clicking on the name.

From here, you can update the *Meeting Details*, including *Subject, Location, Meeting Start Time and Date, Meeting End Time and Date*.

Select *Save* when completed.

Panel Members will be automatically emailed about any updates to meetings, including time, location and date changes.

### 9.8. Completing an Access Request Panel

A Panel can only be *Completed* after all the Priorities have been finalised. You cannot complete a Panel if there are still active Priorities assigned to it.

**ACTIONS**

Under the *Access Request Panels >> Administer Access Request Panels* tab.

- Locate the Panel through the search screen.
- Fill in the known fields and press *Search*.
- The search results will appear at the bottom of the screen.
- Select the Panel by clicking on the name.
- Change Status from *Available* to *Completed*.
- Select *Save* when completed.
9.9. Locating Priorities/Access Requests in *My Access Request Panels*

9.9.1. Searching

General search instructions are detailed under **Common Tasks** in Chapter 4.

This section applies to Access Request Panel Administrators, Access Request Panel Convenors and Panel Members.

To view the Priorities/Access Requests in your Panel, first select *My Access Request Panels* from the drop-down menu under *Access Request Panels*.

This will allow you to search for a specific panel.

From here, you can search for Priorities in your Panel. The search results will appear at the bottom of the page.
On this page, you can see a summary of the student details for each Access Request Priority, including:

- Name, M/F, Scholastic Year and SRN
- Access Request: Principal Networks
- School: Educational Services
- School: Principal Networks
- Priority detail, Provision Requested and Priority Status
- Access Request Panel
- Outcome contains three checkboxes, which are processed during the Panel meeting. The checkboxes indicate which sections have been completed. Only Draft is available for changes.

9.9.2. Viewing Access Request Panel details

To view detail about the individual Panel, click on the blue hyperlink under the Access Request Panel column, fill in detail (if known) and select search.
This screen will appear:

![View AR Panel]

VIEW ONLY:
You cannot edit from the View Panel window; it is for viewing only.

9.10. Actions menu

9.10.1. Selecting an Action

The Actions drop-down menu lists all of the actions available under the Panels tab. These actions apply to the Panel Convenor only.
To select an action, you must first always tick the box to select an entry (student) from the search results at the bottom of the page.

You can select multiple entries to view at once in a list by ticking multiple boxes or select all the entries in the list, by ticking the top box. This will automatically select all entries in the list.

9.10.2. Transfer to another Panel

This section applies to Panel Convenors only.

The Panel Convenor can transfer a Priority to another Panel if it has been directed to the wrong Panel, or when transferring Priority/s from the Pre-Panel Meeting to a Panel. A Priority can only be transferred before the Panel Meeting start date.

**ACTION**

Under the Access Request Panels >> My Access Request Panels tab.
Select student name/s (tick box).
Select Transfer to another Panel in the drop-down menu under Actions.
Again, select the student name/s (tick box).
Select the Panel to transfer the Priority.

Add an explanation to the Comments section, and then select Transfer.

An email will be sent to the CHC (AR/P1 Owner) to advise of the action.

9.10.3. Request from Panel to Return to School

A Panel Convenor can request a Priority Return to School by selecting Actions: Return to School Request. This can only be actioned prior to a Panel Meeting or where the Priority Outcome Status is Draft.

This may be done if there is not enough information in the Access Request to assess the Priority.
If an Access Request is resubmitted from a school, it will appear in the Post Office, where it is then assigned to a Clearing House again. It is not possible to send the Priority back to the original Panel as the Panel is no longer available to accept Priorities (after the start date).

However the Priority can be assigned to another available Panel or be assigned to the Interim (Emergency) Panel (ongoing) for a decision.

**ACTION**

Under the *Access Request Panels* >> *My Access Request Panels* tab.

Select student name/s (tick box).

Select *Return to School Request* in the drop-down menu under *Actions*.

Again, select the student name/s (tick box).

Fill in the *Comments* section with an explanation for the return.

Click on *Request*.

The appearance of the icon for that Priority in *My Clearing Houses* will alter.

An email will be sent to the Clearing House Coordinator (AR/P1 Owner).

### 9.10.4. Return to Clearing House

A Panel Convenor can return a Priority to the Clearing House by selecting *Return to Clearing House*. This can only be actioned prior to a Panel meeting or where the Priority Outcome Status is *Draft*.

This may be done if a request has been received, for example:

- from the Clearing House to return the Priority because a higher order Priority has been supported
- to withdraw a Priority
- to transfer the Access Request to another Educational Services area.

In each case, the Priority/Access Request will be returned to the Clearing House for the CHC (AR/P1 Owner) to Action.
**ACTION**

Under the **Access Request Panels >> My Access Request Panels** tab.

Select student name/s (tick box).

Select **Return to Clearing House** in the drop-down menu under **Actions**.

Again, select the student name/s (tick box).

Fill in the **Comments** section with an explanation for the return.

Click on **Return**.

An email will be sent to the Clearing House Coordinator (AR/P1 Owner).

**9.10.5. Enter Priority Outcome**

The main purpose of the Access Request Panel is to determine and enter the **Status for a Priority**, the details of which will be entered by the Panel Convenor. When completing the **Panel Priority Outcome** screen, a number of fields need to be entered, including setting the Status of the Priority to Supported, Deferred or Declined.

When all sections of the **Panel Priority Outcome** screen have been entered and finalised, the Panel Convenor will click on **Saved as Completed**.

The fields requiring entry will differ according to the type of Provision Requested by the School Learning and Support Team in the Access Request. The Priority requests fall into seven groups:

1. Itinerant Vision
2. Itinerant Hearing
3. Integration Funding Support
4. Special School, Support Classes (excluding Early Intervention)
5. DE – School/Centre; DESU
6. Support Class, Early Intervention
7. Itinerant Early Intervention, Early Intervention Resource

See **Appendix 2** for details required when completing each of the seven types of Priority requests.
**ACTION**

Under the Access Request Panels >> My Access Request Panels tab.

Select student name/s (tick box).

Select Enter Priority Outcome in drop-down menu under Actions.

If you ticked multiple students or Priorities, only one Priority Outcome screen will appear at any given time. The top right hand side of the screen will detail the Priority at which you are dealing, with the Student Name and the Priority (P1, P2, P3).

**Note:** Some student names may appear two to three times (followed by P1, P2 or P3) if more than one Priority is allocated to the same Panel.

All fields will need to be filled in, including the Section completed tick-boxes.

As you fill in the required fields, you can tick the section check boxes, to the right of each section.

**CHECK BOX FOR EACH SECTION:**

This is a checklist. The Access Request Panel Priority Outcome cannot be Saved as Completed until all three check boxes are ticked. This is to ensure all sections have been assessed.
These check boxes are for your tracking purposes. If you start to complete the Panel Priority Outcome and, for example, have ticked Sections 1 and 2, and Save as Draft, this will automatically appear in My Panel as a Draft. Select Save as Draft when you need to save your work but have not yet completed assessing the Priority.

The example below shows that Sections 1 and 2 have been completed, with Section 3 still outstanding. The Priority remains in Draft mode.
When a Priority is saved as Draft, you can continue to make changes to any section.

Once the Panel Priority Outcome screen is finalised, select Save as Completed.

The Outcome will not Save as Completed until all fields have been filled and all three section check boxes have been ticked. An error list will appear at the top of the page if there are missing data.

**AR Panel Priority Outcome**

- Section 1 Completed is required.
- Section 2 Completed is required.
- Section 3 Completed is required.
- Status of Priority is required.
- Intended Start Date in format (DD/MM/YYYY) is required.

**VISIBILITY OF DRAFT BY OTHER USERS:**

While Panel Priority Outcomes are saved as Draft, they are not visible to any other user, including the CHC (AR/P1 Owner). They only become visible when they are saved as Completed.

**9.10.6. Assign Hearing and Vision Priorities to another Panel**

As part of the Clearing House process, the Clearing House Coordinator assesses the Access Request and then assigns it to an appropriate Local Panel.

If a panel or indeed the Clearing House Coordinator (in discussion with the senior Clearing House Coordinator) determines that the level of itinerant support is outside the maximum recommended guidelines (refer to the Hearing and Vision Guidelines) the access request can be assigned to the statewide hearing/vision panel. If the Access Request is in the Clearing House, under Actions select Assign Priorities to Access Request Panels and select the appropriate Panel.
If the Access Request is in the panel, under Actions, select transfer to another Panel and select the appropriate Statewide Panel.

A priority can only be transferred by the Panel Convenor

- before the panel meeting start date, or
- if in the Panel, and there is no Access Request Panel Priority Outcome such as completed or draft; only Close has been selected.

9.11. Access Request Panel Summary Reports

Access Request Panel Reports are available in the Access Request Panels tab under the Panel Report drop-down menu in both My Access Request Panels and Administer Access Request Panels. Reports available through the My Access Request Panels are about individual students/priorities. Reports available through Administer Access Request Panels are about individual Panels and provide the detail of all priorities assigned to the Panel.

REPORT DETAIL:
In addition to student detail, the Reports contain disability codes and Integration Funding Support profiles, if applicable.


Reports on Access Request Panels can be created under the Access Request Panels >>, My Access Request Panels tab.

You can search by Panels, by Priorities etc. before running this Report function (Section 4.1.8).

Once the data appear on the screen, select the students by ticking the check box.

There are two Panel Reports available for Panels under My Placement Panels:

- Panel Summary Report PDF
- Panel Summary Report CSV
Panel Summary Report PDF

GIVE TO MEMBERS:

The Panel Convenor may give Members a copy of this PDF in the Meeting to make comments against each Priority.

The Panel Summary Report PDF will display a summary of each Priority under a particular Panel in a PDF. In addition to student detail, the Reports contain disability codes and Integration Funding Support profiles, if applicable.

This summary will be discussed at the Panel Meeting. There is a section in the Report’s printed-out PDF where Panel Members can make notes during the meeting.

The report will be made available under My Reports tab and will also be emailed to you.

To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.

Panel Summary Report CSV

The Panel Summary Report CSV will display a summary of the Priorities under a particular Panel in an Excel file.

The report will be made available under My Reports tab and will also be emailed to you.
To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.


Reports on Access Request Panels can be created under the Access Request Panels >> Administer Access Request Panels tab.

This screen will appear:

There are three Actions available for Panel summary reports:

- Panel Summary
- Panel Summary Report PDF
- Panel Summary Report CSV.

Panel Summary

The Panel Summary Report will display a summary of the Priorities under a particular Panel on the screen.

ACTION

First, you need to search for a Panel (or Panels) on which to base the reports. Fill in the search fields, and press Search.
The search results will appear at the bottom of the screen. There may be multiple entries or just one.

To select an action, you must first always tick the box for the nominated Panel. You can select multiple Panels to view at once in a list by ticking multiple boxes. To select all the Panels in the list, tick the top box.

Select Panel Summary from the Actions drop-down menu.

This screen will appear:

![Panel Summary Screen]

To print a copy of the report, click on Print at the bottom right hand corner of the pop-up screen.
Panel Summary Report PDF

*Panel Summary Report PDF* will display a summary of each Priority under a particular Panel in a PDF. This summary will be discussed at the Panel Meeting.

First, you need to search for the Panel (or Panels) on which to base the reports.

Fill in the search fields, and press *Search*.

The search results will appear at the bottom of the screen. There may be multiple entries or just one.

To select an action, you must first **always** tick the box for the nominated Panel. You can select multiple Panels to view at once in a list by ticking multiple boxes. To select all the Panels in the list, ticking the top box, will automatically select all Panels in the list.

Select *Panel Summary Report PDF* from the *Actions* drop-down menu.

To view the report from *My Reports*, select the tick box and then press *Download*, or download the attachment directly from your email.

Panel Summary Report CSV

The *Panel Summary Report CSV* will display a summary of the Access Requests/Priorities under a particular Panel in an Excel file.

9.12.1. Under the Actions Menu

The following tasks are described in the Common Tasks chapter:

<table>
<thead>
<tr>
<th>Action Menu Item</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return to School Request</td>
<td>Section 4.4</td>
</tr>
<tr>
<td>Upload Attachment</td>
<td>Section 4.7</td>
</tr>
<tr>
<td>Download Access Request PDF</td>
<td>Section 4.9</td>
</tr>
<tr>
<td>Generate Report</td>
<td>Section 4.11</td>
</tr>
</tbody>
</table>

9.12.2. Download button

The Download button appears in the My Access Request Panels next to the Actions drop-down menu. This Download button will reproduce the information listed on the screen in an Excel file (see Section 4.8 for more detail).
Chapter 10 - Clearing Houses: after the Access Request Panel

10.1. Workflow

This diagram shows the Clearing House processes for the CHC (AR/P1 Owner) after the Panel.
Priorities are assigned to the Panels, who meet and decide on the status of each Priority as Supported, Deferred or Declined. When saved as Completed, the recommendations are automatically returned to the Clearing House Coordinator (AR/P1 Owner).

The CHC (AR/P1 Owner) will make a determination on the final Priority Status, and mark the Access Request as Completed. This is done only after there is a decision on the Priority/s requested and accepted by all stakeholders – school, parents/carer(s) and State Office, where applicable.

VIEW ONLY:
Clearing House Coordinators assigned to P2 and P3 can read and view the Priority Outcome recommendations from the Panel. However, the Clearing House Coordinator (AR/P1 Owner) is the only role that can action them.

10.1.1. Clearing House Administrator

The Clearing House Administrator primarily creates Clearing Houses and takes the actions described in Section 7.4.
10.1.2. Clearing House Coordinator (AR/P1 OWNER) workflow

This flowchart details the decision-making process of the Clearing House Coordinator (AR/P1 Owner).

The CHC (AR/P1 Owner) determines the final outcome of the Access Request by considering the Panel Status/es of the Priority/s. The P1 Statuses will be considered first as they are the first preference for the student.
10.2. Actions

10.2.1. Selecting an Action

The Actions drop-down menu lists all of the actions available under the Clearing House tab.

To select an action, you must first **always** tick the box for the nominated Access Request(s)/Student(s). You can select multiple students to view at once in a list by ticking multiple boxes. To select all the students in the list, tick the top box.

10.3. Using search filters to locate Access Requests in ‘My Clearing Houses’

The search filters under the My Clearing Houses tab allow the Clearing House Coordinator to locate Access Requests that fit specific criteria.

To limit searching through rows of data, filters can be used to separate Priority/s **before** and **after** the Panel.
Before the Access Request Panel
This is described in Section 8.3.

After the Access Request Panel

1. Generally, leave the default search option under (Provision Requested) Type of Support Class and School Type to All.

Under Outcome Category, select the Outcome required. These Outcome categories relate to one of seven possible categories used by the Access Request Panel to complete Priority Statuses. They are detailed in Appendix 2.

2. Under Outcome, there are two options available:
- *No Outcome / Completed Outcome* captures all Priorities (excluding those that have not been finalised by the Panel and are still in Draft). Draft outcomes will never be visible to any users, including the Clearing House Coordinators.
- Completed Outcome

3. **Outcomes Reviewed** refers to whether the Reviewed tick-box has been selected (Section 10.6).

4. There are two other search options with a check box
   - Show only ARs with a Priority 1 having a status considered *Not Supported*
   - Show only ARs transferred in

**SEARCHING HINT:**

If you only want to only view SCAS Multicategorical Classes:
- Select SCAS – *Multicategorical* from the drop-down menu *Type of Support Class*
- Then select *Special Schools, Support Classes (excluding Early Intervention)* from the Outcome drop-down menu.

For more specific results, more filters can be used. See Section 8.3 for more detail about these:

- **Type of Support Class**: These options relate to the Support Classes (SCAS) *in regular schools* as identified in the *Provision Requested* section of the Access Request by the School Learning and Support Team
- **School Placement Type**: Includes the subcategories across itinerant programs, support classes in special schools, distance education support unit and centre. This is as identified in the *Provision Requested* section of the Access Request by the School Learning and Support Team
- **Priority**: 1, 2 or 3
- **Clearing House**: Select a specific Clearing House if you have access to more than one
- **Priority Status**: Searches by Priority Status, for example you may wish to search for only *Assigned to Clearing House Priorities*
10.4. Clearing House Coordinator (AR/P1 Owner): Manage Priority Status

The CHC (AR/P1 Owner) will determine the final Priority Status based on recommendations received from the Access Request Panel. This is done under the Action *Manage Priority Status*.

The CHC (AR/P1 Owner) will evaluate the Priority Statuses and seek to find the best outcome for the student. During this process, the CHC (AR/P1 Owner) will look at P1, then P2 and then P3 to determine the optimum result for the student and stakeholders.

There are three categories of Priority Statuses that will be returned from the Access Request Panel:

- **Supported**
- **Deferred**
- **Declined**

There are 2 ways of examining Priorities and determining the optimum result for the student and stakeholders.

1. If you do not use the Outcome: *Completed Outcome* filter, manually select students as they appear on the screen in My Clearing House. Then select *Manage Priority Status* in the drop-down menu under *Actions*. You will see the following screen. This screen allows you to make a judgement about each Priority. However it does not have an option to let you indicate that the priority statuses have been reviewed or to finalise the Access Request.
2. The preferred option: Generally you would be working on those Priorities with a Completed Outcome. Your search criteria need to include this filter as well as any other search filter you may select. The search results will appear on the screen. After selecting Manage Priority Status in the drop-down menu under Actions, you will see the screen which allows you to make a judgement about each Priority. It also allows the option to indicate that the priority statuses have been reviewed and to finalise the Access Request. See Sections 10.6 and 10.8.

**ACTIONS for searching for Priority/s with Completed Outcome**

- Select Completed Outcome from the Outcome drop-down menu in the Search Criteria. Using further search fields is optional.
- Select Search.
- The search results will appear on the page below. This search has captured all Priorities with a Completed outcome.
- Select student name/s (tick box).
- Select Manage Priority Status in drop-down menu under Actions.
- All the students with completed Priority Statuses will be shown here.
- Again, select the student name (tick box).
- Select the Priority Status based on professional judgement from each drop-down box, as shown in the following tables.
- Once the Status has been selected, the CHC (AR/P1 Owner) will indicate that the priority/s has been reviewed, by selecting the Reviewed tick box. This tick box can be unchecked if changes need to be made to the Priority/s.
- Select Save at the bottom right hand corner of the screen.
- When the Priority Statuses have been finalised, the Access Request can be finalised by changing the Access Request Status from In Progress to Completed or Declined. The CHC (AR/P1 Owner) takes this action. See Sections 10.6 and 10.8 Clearing House Coordinator (AR/P1 Owner): Finalising an Access Request.

**Supported Status**

When a Panel returns a Supported Status for a Priority, the CHC (AR/P1 Owner) can make the following final determinations:
PRIORITY 1 (P1):

<table>
<thead>
<tr>
<th>Status from Panel</th>
<th>Options available to Clearing House Coordinator (AR/P1 Owner)</th>
<th>Final Status Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>P1: Supported</strong></td>
<td>If a P1 is <em>Supported</em>, there is no need to evaluate P2 and P3 in the first instance.</td>
<td>To show that the P1 is being accepted, leave the entry as <em>Supported</em>.</td>
</tr>
<tr>
<td></td>
<td>If a P1 is <em>Supported</em> but the stakeholders are dissatisfied with the details (for example, not satisfied with the location), the request can be changed to <em>Deferred</em> and considered again by the Panel at a future date.</td>
<td>To show that the P1 is deferred, select <em>Deferred</em> from the drop-down menu.</td>
</tr>
<tr>
<td>Supported (On Hold)</td>
<td><em>Supported (On Hold)</em> is generally not used for P1. However, there may be a situation in which stakeholders need more time to make a decision. P2 may be considered until a P1 decision is made.</td>
<td>To show that the P1 is being placed on hold, select <em>Supported (On Hold)</em> from the drop-down menu.</td>
</tr>
<tr>
<td>Supported (No Further Action)</td>
<td><em>Supported (No Further Action)</em> is generally not used for P1. Continuing with the above example, should stakeholders decide against P1, <em>Supported (No Further Action)</em></td>
<td>To show that the P1 was offered but will not be pursued, select <em>Supported</em></td>
</tr>
<tr>
<td>Status from Panel</td>
<td>Options available to Clearing House Coordinator (AR/P1 Owner)</td>
<td>Final Status Outcome</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td></td>
<td>indicates the Priority was supported, but not taken up.</td>
<td>(No Further Action)</td>
</tr>
<tr>
<td></td>
<td><em>Note: This outcome of ‘Supported (No Further Action)’ cannot be changed – it is final.</em></td>
<td></td>
</tr>
</tbody>
</table>

**PRIORITY 2 (P2) AND PRIORITY 3 (P3):**
After considering P1, you can then focus on the P2 and P3 Priority Statuses (if applicable).

<table>
<thead>
<tr>
<th>Status from Panel</th>
<th>Options available to Clearing House Coordinator (AR/P1 Owner)</th>
<th>Final Status Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>P2, P3: Supported</td>
<td>A P2 or P3 may receive a Supported decision from the Panel. If P1 is Declined, Deferred (or in rare circumstances Supported (No Further Action)), the CHC (AR/P1 Owner) will consider P2 and/or P3.</td>
<td>To show that the P2 or P3 is being accepted, leave the entry as Supported.</td>
</tr>
<tr>
<td></td>
<td>While investigating whether a Supported P2 or P3 is suitable, the request can be placed on hold.</td>
<td>To show that the P2 or P3 is being considered, select Supported (On Hold) from the drop-down menu.</td>
</tr>
<tr>
<td></td>
<td>Stakeholders may choose not to pursue the offered P2 or P3.</td>
<td>To show that the P2 or P3 was offered but will not be pursued, select Supported (No Further Action) from the drop-down menu.</td>
</tr>
<tr>
<td></td>
<td><em>Note: This outcome of ‘Supported (No Further Action)’ cannot be changed – it is final.</em></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If stakeholders want the details of a Supported Priority to be reconsidered by the Panel, for example another location, the Priority can be changed to Deferred.</td>
<td>To show that the P2 or P3 is deferred, select Deferred from the drop-down menu.</td>
</tr>
</tbody>
</table>
‘Deferred’ Status

When a Panel returns a Deferred Status for a Priority, the CHC (AR/P1 Owner) can make the following final determinations:

PRIORITY 1 (P1):

<table>
<thead>
<tr>
<th>Status from Panel</th>
<th>Options available to Clearing House Coordinator (AR/P1 Owner)</th>
<th>Final Status Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>P1: Deferred</strong></td>
<td>If a P1 is Deferred, it means that although the student was eligible, the provision was not available. The family/carer may choose to have the request considered again by the Panel at a future date. If a P1 is Deferred and the family/carer decides not to wait for another Panel but to accept the outcome of another Priority (P2 or P3). <strong>Note:</strong> This outcome of ‘Deferred (No Further Action)’ cannot be changed. It is final.</td>
<td>To show that the P1 is being deferred, leave the entry as <strong>Deferred</strong>. To show that the P1 is deferred with no further action, select <strong>Deferred (No Further Action)</strong> from the drop-down menu.</td>
</tr>
</tbody>
</table>
PRIORITY 2 (P2) AND PRIORITY 3 (P3):
After considering P1, you can then focus on the P2 and P3 Priority Statuses (if applicable).

<table>
<thead>
<tr>
<th>Status from Panel</th>
<th>Options available to Clearing House Coordinator (AR/P1 Owner)</th>
<th>Final Status Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>P2, P3: Deferred</td>
<td>If a P2 or P3 is Deferred, it means that although the student was eligible, the provision was not available. The family/carer may choose to have the request considered again by the Panel at a future date.</td>
<td>To show that the P2 or P3 is being deferred, leave the entry as <strong>Deferred</strong>.</td>
</tr>
<tr>
<td></td>
<td>If a P2 or P3 is Deferred, the family/carer may decide not to wait for another Panel.</td>
<td>To show that the P2 or P3 is deferred with no further action, select ‘Deferred (No Further Action)’ from the drop-down menu.</td>
</tr>
</tbody>
</table>

*Note: This outcome of Deferred (No Further Action) cannot be changed. It is final.*

‘Declined’ Status
When a Panel returns a Declined Status for a Priority, the CHC (AR/P1 Owner) has no other options.

PRIORITY 1 (P1):

<table>
<thead>
<tr>
<th>Status from Panel</th>
<th>Options available to Clearing House Coordinator (AR/P1 Owner)</th>
<th>Final Status Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1: Declined</td>
<td>If a P1 is Declined, there are no changes to be made. You will then examine P2 and P3.</td>
<td><strong>Declined</strong> (no other options available)</td>
</tr>
</tbody>
</table>
PRIORITY 2 (P2) AND PRIORITY 3 (P3):

<table>
<thead>
<tr>
<th>Status from Panel</th>
<th>Options available to Clearing House Coordinator (AR/P1 Owner)</th>
<th>Final Status Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>P2, P3: Declined</td>
<td>If a P2 or P3 is Declined, there are no changes to be made.</td>
<td>Declined (no other options available)</td>
</tr>
</tbody>
</table>

10.5. **AND** and **OR** Priorities

There can be up to three Priorities selected in the Provision Requested section of an Access Request. This is completed by the School Learning and Support Team and submitted to the Access Request Process. In most cases, the requested provisions are separated by an **OR**. However there are some Access Requests where the Priorities are separated by an **AND**.

**AND** is only possible when provisions which include *Itinerant Hearing and/or Vision* are requested in the Access Request.

They are shown in the final three columns of the search results under *My Clearing Houses*, as shown below.

10.5.1. **OR** Priorities

If an Access Request has more than one Priority with an **OR** between each Priority, there can only be one that is **Supported**.

10.5.2. **AND** Priorities

If an Access Request has more than one Priority with an **AND**, then more than one Priority can be **Supported**.
10.6. Clearing House Coordinator (AR/P1 Owner): Reviewed tick-box and finalising an Access Request

The CHC (AR/P1 Owner) must check the Reviewed tick box to indicate that they have reviewed the final determinations of the Priorities in the Access Request. If the Reviewed tick-box is not selected, the Access Request cannot be Completed or Declined.

**ACTIONS**

Under the *Clearing Houses >> My Clearing Houses* tab:

Use the search criteria.

Search for Priority/s with *Completed* Outcome. This is done by selecting *Completed Outcome* from the Outcome drop-down menu. Using further search fields is optional.

Select *Search*.

The search results will appear on the page below. This search has captured all Priorities with a *Completed* outcome.

Select student name (tick box)

Select *Manage Priority Status* in drop-down menu under *Actions*.

A screen similar to this will appear:
IMPORTANT: Locating the Reviewed tick-box and Access Request Status

The *Reviewed tick box* and *Access Request Status* can be seen by scrolling to the far right of the pop-up window, using the scroll bar.

After scrolling to the far right, the *Reviewed* tick-box and *Access Request Status* will appear:

![Screenshot of Access Request Process](image)

10.6.1. Finalising an Access Request

To complete an Access Request

- **Or Priorities**
  If any of the priorities are SUPPORTED, then only one priority can be supported. The other priorities can be deferred no further action, supported no further action, to be assigned, assigned to CH, assign to Panel, withdrawn, return to school, return to CH.

- **And Priorities**
  At least one of the priorities must be SUPPORTED, deferred no further action or supported no further action. There can be multiple priorities with supported, deferred no further action or supported no further action.
To decline an Access Request

- If a priority is declined and if no other priorities are supported, deferred no further action or supported no further action, then the Access Request status is declined.

10.7. SCAS Registrations for census enrolments only – not yet available

A new functionality will be introduced where the CHC (AR/P1 Owner) can initiate the SCAS registration offer for a student; when the new registration is a census enrolment.

For the Clearing House Coordinator to action this, the following conditions must exist:

- Outcome category supports a SCAS registration (i.e. support class in regular or special school)
- Priority is supported
- Status of Access Request is in progress

10.8. Clearing House Coordinator (AR/P1 Owner): finalising an Access Request

From this screen, you can also finalise the Access Request by changing the Access Request Status from In Progress to Completed or Declined. Once finalised, an Access Request cannot be reopened.
You can use the tick box option Assign to all rows to make all entries the same as that which you completed. For example, if you assign the first entry as Completed, ticking Assign to all rows will make all entries in that list Completed.

Click on Save at the bottom of the screen when you have finished.

FINALISED ACCESS REQUESTS:
Once finalised, an Access Request cannot be reopened.

10.9. Clearing House Coordinator (AR/P1 Owner): Reassign Priorities to Clearing Houses

The CHC (AR/P1 Owner) can reassign ownership of P1 to another Clearing House. This would most likely occur if P1 is returned as Declined or Deferred with P2 or P3 Supported.
The CHC (AR/P1 Owner) may reassign ownership to the Clearing House Coordinator (P2, P3) to manage letters, correspondence and follow-up actions related to the Priority/s and to finalise the Access Request.

**ACTION**

Under the *Clearing Houses >> My Clearing Houses* tab.

- Select student name/s (tick box).
- Select Assign Priorities to Clearing Houses in drop-down menu under Actions.
- Again, select the student name/s (tick box).
- Select the Clearing House to where you want to reassign the Priority.
- Click on Save.

An email will be sent to the new CHC (AR/P1 Owner).

**CLEARING HOUSE COORDINATOR (AR/P1 OWNER):**

The Priorities of all students may not be available for you to re-assign to another Clearing House. Not all students may be available for you to reassign Priorities to a different Clearing House. You can only action this if you are the CHC (AR/P1 Owner).

10.10. Clearing House Coordinator (AR/P1 Owner): reassign Deferred Priorities to Panels

When a Priority is given a *Deferred* Priority Status by the Panel, the CHC (AR/P1 Owner) can reassign that Priority to a *future* Panel for further consideration.

This would generally occur when the deferred Priority is a higher order Priority, and stakeholders would prefer to pursue it than another lower Priority.
10.11. Return Priorities to Clearing House from Access Request Panels

All Clearing House Coordinators can request the return of their Priority from a Panel. The CHC (AR/P1 Owner) can request return of any Priority from a Panel. This can only be actioned by the Panel Convenor prior to a Panel Meeting or where the Priority Outcome Status is Draft.

For more detail, see Section 8.8.

10.12. Clearing House Coordinator (AR/P1 Owner): steps for finalising an Access Request

A Priority Status and Access Request is finalised when the following steps have been completed by the Clearing House Coordinator (AR/P1 Owner):

**STEP 1:** The CHC (AR/P1 Owner) has Reviewed the Priority and made a final determination, updating the Priority Statuses as required (Section 10.6).
STEP 2: If SCAS placement is recommended, download SCAS Report to allow for SCAS Registration in SCAS/ERN. (Section 10.7 and Section 11.2)

STEP 3: If Integration Funding Support is recommended, process State Office Integration FS Report, which will automatically generate an email to State Office. (Section 11.2)

STEP 4: Depending on the type of Priority Outcome, take appropriate actions, such as letters and communication to school, parents/carers.

STEP 5: Parents/carers accept decision. Or if they decline, consider actions to look at other Priorities, or consider deferring the Priority depending on the reason why parents/carers declined offer.

STEP 6: State Office, where required, may follow up on Integration Funding Support applications where information does not support the profile submitted.

STEP 7: CHC (AR/P1 Owner) finalises the Access Request by changing the Access Request Status from In Progress to Completed or Declined. This step is detailed in Section 10.8.

DECLINING A DECISION:

If the school, parent(s) or carer(s) decline a decision (Step 5 above), the Clearing House Coordinator (AR/P1 Owner) will Action Manage Priority Status as Deferred or may explore lower order Priorities (P2, P3), if appropriate.
10.13. Running reports

The CHC (AR/P1 Owner) will run a number of reports after a Priority is returned from the Panel. These are explained in Chapter 11, and in the Sections below.

10.13.1. Importance of the Reviewed tick-box

To run Reports following decisions in relation to Priority Status, it is critical that the Reviewed tick-box is selected (Section 10.6). If it is not selected, the Report will not include those priorities.

10.13.2. Report: State Office Integration Funding Support (FS)

The process for running this report is detailed in Section 11.6.

After the CHC (AR/P1 Owner) has finalised the Priority Status, the program will allow a download of Access Requests where Integration Funding Support as a Priority has been identified as both Supported and Reviewed and ready to be sent to State Office.
Resubmitted Access Requests

An Access Request has been previously sent to State Office but needs further work from the school, and the school resubmits. Once the Priority has been supported and reviewed, the program will automatically identify this Access Request as new. It will be captured by a later State Office IFS Report.

Start and End Dates

It is critical that you remember the last End Date on which you ran this report function so you do not miss any Access Requests to send to State Office. As the data will only be captured once, it is better to double up on dates than risk missing a Supported and Reviewed Access Request.

ACTIONS

Under the Reports tab:

Select Generate Report

Select State Office Integration FS from the Report pull down menu

Provide a Start and End Date

Give the Report a name and Save Criteria. (Section 11.4).

Once you create the Report, it will be automatically sent to State Office, available under My Reports and emailed to the person who generated the Report.

10.13.3. Report: SCAS Registration

SCAS Registration Report captures the data required for the SCAS registration of those Priorities that are both Supported and Reviewed and relate to placements in Support Classes and Special Schools.
This Report is used to capture all the data needed for the appropriate SCAS registration of a student, including shared information, factor of need, starting date; type of support class etc.

**ACTIONS**

Under the Reports tab:

Select *Generate Report*

Select *SCAS Registration* from the *Report* pull down menu

Provide a Start and End Date

Give the Report a name and Save Criteria.

See Section 4    Section 11.2    Section 11.3

Once you create the Report, it will be available under *My Reports* and emailed to the person who generated the Report.

10.13.4. Distance Education

**Report: Distance Ed School/Centre**

This report lists those Access Requests that are both *Supported* and *Reviewed* and relate to Distance Ed School/Centre. Once the Access Request has been marked as *Completed* it can be attached to an email and processed according to Distance Education Guidelines.

**Report: Distance Ed Support**

Those Access Requests that have been *Completed* can be transferred to Northern Sydney area through Actions: *Transfer to area* (Section 4.5).

These Access Requests will appear in the Post Office of Northern Sydney and will be directed to the appropriate Clearing House and Panel. The history associated with the Access Request will be available to the new area.

10.14.1. Under the Actions Menu

The following tasks are described in the ‘Common Tasks’ chapter:

<table>
<thead>
<tr>
<th>Action Menu Item</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return to School</td>
<td>Section 4.4</td>
</tr>
<tr>
<td>Transfer to another Post Office</td>
<td>Section 4.5</td>
</tr>
<tr>
<td>Withdraw Access Request</td>
<td>Section 4.6</td>
</tr>
<tr>
<td>Upload Attachment</td>
<td>Section 4.7</td>
</tr>
<tr>
<td>Download Access Request PDF</td>
<td>Section 4.9</td>
</tr>
<tr>
<td>Extract Data for Letters</td>
<td>Section 4.10</td>
</tr>
<tr>
<td>Generate Report</td>
<td>Section 4.11</td>
</tr>
<tr>
<td>Transfer to another Clearing House</td>
<td>Section 8.9</td>
</tr>
</tbody>
</table>
10.14.2. Download button

The *Download* button appears in:

- *Post Office*
- *Clearing Houses >> Administer Clearing Houses*
- *Access Request Panels >> Administer Access Request Panels*
- *Access Request Panels >> My Access Request Panels*

This *Download* button will reproduce the information listed on the screen in an Excel file. It is helpful when you would like to download onscreen search results into an Excel file for data collection. For further details see *Section 4.8*. 
Chapter 11 - Creating Reports

11.1. Locating reports in the Access Request Process

Reports are available to use throughout the Access Request Process program. This Chapter explains the different types of Reports. It focuses on the Reports tab.

11.1.1. Reports in Post Office, Clearing Houses and Access Request Panels Tabs under their Actions menus

Reports functions are available under the Actions menu of the Post Office, My Clearing Houses and Access Request Panels tabs.

These Reports will capture data based on progress of the Priority in the process. For example, Access Request Panel Reports will capture the data of Priorities and Access Request under the Access Request Panel.

The following reports functions are described in the Common Tasks Chapter 4.

<table>
<thead>
<tr>
<th>Report Function</th>
<th>Available Under</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload Attachment</td>
<td>Post Office</td>
<td>Section 4.7</td>
</tr>
<tr>
<td></td>
<td>Clearing Houses &gt;&gt; My Clearing Houses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Access Request Panels &gt;&gt; My Access Request Panels</td>
<td></td>
</tr>
<tr>
<td>Download Access Request PDF</td>
<td>Post Office</td>
<td>Section 4.9</td>
</tr>
<tr>
<td></td>
<td>Clearing Houses &gt;&gt; My Clearing Houses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Access Request Panels &gt;&gt; My Access Request Panels</td>
<td></td>
</tr>
</tbody>
</table>
### 11.1.2. Reports in Access Request Panels >> Administer Access Request Panels under Panel Reports

Under Access Request Panels >> Administer Access Request Panels tab, you can select Panel Reports.

Three options are available:
- On screen through Access Request Panel Summary with a Print function
- In a PDF through Panel Summary Report PDF
- In an Excel File though Panel Summary Report CSV

This is detailed in Section 9.11.

### 11.1.3. Reports in Access Request Panels >> My Access Request Panels under Panel Reports

Under Access Request Panels >> My Access Request Panels tab, you can select Panel Reports.

Two options are available:
- In a PDF through Panel Summary Report PDF
- In an Excel File though Panel Summary Report CSV

This is detailed in Section 9.11.
11.2. Types of reports

The following Reports are available under the Reports tab and are further explained in the sections below. The Reports tab is at the top right hand side of the screen. Under this tab, you can generate Reports across the whole Access Request Process, not just specifically to one stage.

<table>
<thead>
<tr>
<th>Report</th>
<th>Explanation</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Office Integration FS</td>
<td>One-off for selected date range (inclusive of start and end dates) of Integration Funding Support being the Priority that is Supported and Reviewed. This results in an automatic email sent to State Office, the report saved under My Reports and emailed to the person who generated the report.</td>
<td>Sections 10.13 and 11.6.1</td>
</tr>
<tr>
<td></td>
<td>The email address is: <a href="mailto:ifsnewapplications@det.nsw.edu.au">ifsnewapplications@det.nsw.edu.au</a></td>
<td></td>
</tr>
<tr>
<td>Itinerant Hearing Itinerant Vision</td>
<td>Summary of Access Requests with a Supported and Reviewed Priority for Itinerant Hearing and/or Itinerant Vision.</td>
<td>Section 11.6.2 Note: Section 10.5 explains the AND and OR Priorities in relation to Itinerant Hearing/Vision.</td>
</tr>
<tr>
<td>SCAS Registration</td>
<td>Summary of Access Requests with Priorities that have been both Supported and Reviewed in relation to (SCAS) Registration for Support Classes and Special Schools within a date range (inclusive of start and end dates).</td>
<td>Sections 10.13.3 and 11.6.3</td>
</tr>
<tr>
<td>Distance Education School/Centre</td>
<td>Summary of Access Requests with Priorities that have been both Supported and Reviewed for Distance Education School/Centre within a date range (inclusive of start and end dates).</td>
<td>Sections 10.13.4 and 11.6.4</td>
</tr>
<tr>
<td>Distance Education Support Unit</td>
<td>Summary of Access Requests with Priorities that have been both Supported and Reviewed for Distance Education Support Unit within a date range (inclusive of start and end dates).</td>
<td>Sections 10.13.4 and 11.6.5</td>
</tr>
<tr>
<td>Report</td>
<td>Explanation</td>
<td>Section</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>Statistical</td>
<td>Tailored reports based on a large number of tick-box and drop-down menu options and parameters that provide area data.</td>
<td>Section 11.6.6</td>
</tr>
<tr>
<td>• Counts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Detailed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer to area</td>
<td>Summary of all Access Requests transferred to this area within a date range (inclusive of start and end dates).</td>
<td>Section 11.6.8</td>
</tr>
<tr>
<td>Note: Differs from Action: ‘Transfer to area’ under the Post Office, Clearing House and Panel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer from Educational Services area</td>
<td>Summary of all Access Requests transferred from one Educational Services area to another Educational Services area within a date range (inclusive of start and end dates).</td>
<td>Section 11.6.8</td>
</tr>
<tr>
<td>Return to School</td>
<td>Summary of all Access Requests that had a Return to School Status. This will include any Access Requests that have been returned to school at any time, even though the current Access Request Status could be In Progress, Completed etc.</td>
<td>Section 11.6.9</td>
</tr>
<tr>
<td>Note: Differs from Action ‘Return to School’ under the Post Office, Clearing House and Access Request Panel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Panel Summary</td>
<td>Summaries of Panel data on screen, as a PDF or as an Excel file.</td>
<td>Sections 9.11 and 11.6.10</td>
</tr>
<tr>
<td>Note: This Report is also under Access Request Panel &gt;&gt; Administer Access Request Panels</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
11.2.1. My Reports

The My Reports link is where any processed reports are delivered. The user will also receive the report by email. My Reports will retain a history of all reports. It can be searched by ID or date.

11.3. Using reports under the Reports Tab

There are three options under the Actions drop-down menu in the Reports tab:

- **Generate Report:**
  
  This Report is detailed in the sections below for each Report type.

- **Load Report Criteria:**
Before you can *Load Report Criteria* you must select a saved Report by first *using the Search* button.

A working example of saving Report criteria and then loading Report criteria is detailed at Section 11.7.

- **Delete Report Criteria:**
  Before you can *Load Report Criteria* you must select a report *using the Search* button.

### 11.4. Load Report Criteria

#### 1. Save Criteria

Before you can *Load Report Criteria*, you must have previously saved reports.

**ACTIONS**

Under the *Reports* tab: select *Generate Report* from the *Actions* drop-down menu.

This screen will appear:

![Generate Report](image)

Select the type of report from the *Reports* drop-down menu.
Fill in the fields you require.
Give the Report a meaningful name.
Select Save Criteria.
By saving criteria, you can use those same fields when creating future Reports under the same tab.
To access saved criteria, select Load Criteria.

2. Load Criteria

Under the Reports tab, the default page allows you to search for saved criteria.

Your area will automatically appear. If the date you saved the report criteria is known, enter date. Otherwise leave the fields blank and select Search.

All your Saved Criteria reports will appear in the search results list at the bottom of the screen.

To load the report criteria, you must first always tick the box for the nominated Saved Criteria.
Select Load Report Criteria from the Actions drop-down menu.

The screen with the saved criteria settings will appear. From here, you can change fields if required, save those changes as a new saved criteria or generate the report.

Once you select create Report, the report will be made available under My Reports and will also be emailed to you.

To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.

11.5. Delete Report Criteria

If you no longer require your Saved Report Criteria, you can delete them. This can be helpful when you have many pre-selected criteria listed.

ACTIONS

Search for your Saved Criteria reports which will appear in the search results list at the bottom of the screen.

To delete the report criteria, you must first always tick the box for the nominated Saved Criteria.

Select Delete Report Criteria from the Actions drop-down menu.
11.6. Report details

11.6.1. State Office Integration Funding Support

After the CHC (AR/P1 Owner) has finalised the Priority Status and Integration Funding Support is the Supported Priority, the program allows for the download of these Supported and Reviewed Priorities to be sent to State Office.

**REVIEWED AND SUPPORTED PRIORITIES:**

This Report will only pick up on Access Requests where the Reviewed tick-box has been selected and has a Supported Priority Status.

A particular Access Request will only be captured once, based on the selected date range in the Report (inclusive of start and end dates). The CHC (AR/P1 Owner) will run this report function at regular intervals, depending on area processes.
Resubmitted Access Requests

An Access Request has been previously sent to State Office but needs further work from the school. If the school resubmits, the program will automatically identify this Access Request as a new one. It will be captured by the State Office Integration FS Report after it has been through another Panel.

**ACTIONS**

Under the Reports tab, select Generate Report from the Actions drop-down menu.

On the screen select State Office Integration FS from the drop-down menu.

REMEMBERING DATE SPANS:

It is critical that you remember the last End Date when you ran this report function so you do not miss any Priorities to send to State Office.

As the data will only be captured once, it is better to double up on dates than risk missing a Supported and Reviewed Access Request.

The date spans are inclusive of the start and end dates.

Enter the Start Date and End Date. Only the owner of the specific Clearing House of Senior Clearing House Coordinator is able to generate this report.

Give the Report a specific name. This helps when you need to access the Report at a later date.

If you would like to reuse these report parameters as detailed in Section 11.4, select ‘Save Criteria’.

Once you select Create Report, the report will be made available under My Reports and will also be emailed to you.

To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.
An email Report will be generated and sent to State Office with the Report attached.

CHANGE IN PRIORITY STATUS FOR AN INTEGRATION FUNDING SUPPORT APPLICATION:

A P2 Integration Funding Support provision is marked as Supported and Reviewed, and P1 is marked as Deferred. The P1 may become Supported and P2 Integration Funding Support provision changes to Supported (On Hold) and then Supported (No Further Action). If this occurs, an email will be automatically generated to alert State Office about the change in Priority Status of the Integration Funding Support application.

11.6.2. Itinerant Hearing or Vision

After the CHC (AR/P1 Owner) has finalised the Priority Status and Itinerant Hearing/Vision is the Supported Priority, the program allows for the download of these Supported and Reviewed Priorities.
ACTIONS

Under the Reports tab, select Generate Report from the Actions drop-down menu. Your area will automatically appear.

Select Itinerant Hearing/Vision from the Report drop-down menu.

Select the date span.

Select the Clearing House.

Give the report a name.

If you would like to reuse these report parameters select ‘Save Criteria’.

Once you select Create Report, the report will be made available under My Reports tab and will also be emailed to you.

To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.

11.6.3. SCAS Registration Support Classes and Special Schools

When Priorities have been Reviewed and Supported and relate to SCAS Registration, a Report is available to assist the person responsible for SCAS Registration under Actions: Generate Report. The report contains all the data required, including new school, type of class, factor of need, shared enrolment information and anticipated date of enrolment.

This can be done as an alternative to the Clearing House Coordinator doing the SCAS registration under Manage Priority Status. (this function is not yet available).

11.6.4. Distance Education School/Centre

This Report provides a summary of Access Requests with a Supported and Reviewed Priority for Distance Education School/Centre.
11.6.5. Distance Education Support Unit

This Report provides a summary of Access Requests with a Supported and Reviewed Priority for Distance Education Support Unit.

11.6.6. Statistical

The Statistical report function creates tailored reports based on a large number of parameters, including whether the results are as statistical counts or statistical detailed. These are taken from a combination of any of the following fields:

- Dates or Calendar year
- Start and End Date
- SEG
- School
- Access Request Status
- My Clearing House
- Statewide All/Yes/No
- Placement Panel
- Priority
- Priority Status
- Outcomes Reviewed
- Type of Support Class
- School Placement Type
- Primary Disability Code
- Other Disability Code

Select how you want to search - by (dates or calendar year) and enter date parameters.

Select any additional detail from the drop-down menus.

Give the report a name.

If you would like to reuse these report parameters select Save Criteria.
11.6.7. Transfer to another Post Office

This report details all Access Requests that have been transferred to another Post Office within a date range (inclusive of start and end dates).

11.6.8. Transfer from the Post Office

This report details all Access Requests that have been transferred from the Post Office within a date range (inclusive of start and end dates).

11.6.9. Return to School

This report details all Access Requests that have had an Access Request Status of Return to School at any time. The status of the Access Request may now be Completed, In Progress etc.
11.6.10. Panel Summary

The Panel Convenor can capture data to create a Panel Summary report. This report will detail the summary of all students to be considered at that Panel.

The report will list each Access Request under the Panel summary details on a new page. See Section 9.11 for more details.

This report will also list Statewide Panels.

11.6.11. Extract Data for Letters

This report allows for selected fields to be downloaded into an Excel file to be used for a Mail Merge in Microsoft Office: Word to create letters and other communication.

Appendix 6 explains how to use the Mail Merge function in Microsoft Office: Word.

Select Extract Data for Letters from the Report drop-down menu.
The following screen will appear:

Tick the boxes of all the data you require.

Name the report.

If you want to save the criteria you selected to extract data for future letters, select Save Criteria.

Once you select Create Report, the report will be made available under My Reports tab and will also be emailed to you.
To view the report from *My Reports*, select the tick box and then press *Download*, or download the attachment directly from your email.

### 11.7. Working example: Saving and Loading Criteria under *Statistical Report*

**STEP 1: Save Criteria**

Under the *Reports* tab, select *Generate Report* from the *Actions* drop-down menu.

The following screen will appear:

![Generate Report](image)

Select the type of Report under the *Report* drop-down menu. In this case, we are selecting *Statistical*. 
The following screen will appear:

Fill in all the fields you require.

Give the Report a name. Be specific.

To save the criteria rather than just run the Report, select Save Criteria from the bottom right-hand side of the screen.

The following confirmation will appear at the top of the screen:
The Report criteria are now available to access by using the steps detailed under Load Report Criteria.

STEP 2: Load Report Criteria
All your Saved Criteria reports will appear in the search results list at the bottom of the screen.

To load the report criteria, you must first always tick the box for the nominated Saved Criteria.

Select Load Report Criteria from the Actions drop-down menu.

The screen with the saved criteria settings will appear. From here, you can change fields if required, and save those changes as a new Save Criteria for later use, or Generate Report.

Once you select Create Report, the report will be made available under My Reports and will also be emailed to you.

To view the report from My Reports, select the tick box and then press Download, or download the attachment directly from your email.
Chapter 12 - Handy Hints and System Conventions

These are hints about how to use the Access Request Process system. The table is in alphabetical order according to the HINT table column.

<table>
<thead>
<tr>
<th>HINT</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AND and OR Priorities</strong></td>
<td>An Access Request may have up to three Priorities (P1, P2, P3), which may be separated by an OR or by an AND. An AND is only possible when provisions which include Itinerant Hearing and/or Vision are requested in the Access Request. See Section 10.5.</td>
</tr>
<tr>
<td><strong>Assigning Priorities</strong></td>
<td>An Access Request can have up to three Priorities (referred to in this Guide as P1, P2 or P3).</td>
</tr>
<tr>
<td></td>
<td>A Clearing House may assign P1 to the Panel and only explore P2 and P3 if P1 is not Supported; or it may assign all Priorities at once. This is decided by area processes.</td>
</tr>
<tr>
<td><strong>Assigning area Administrator Role</strong></td>
<td>It is recommended that multiple people are assigned the Post Office Administrator role. (Chapter 5).</td>
</tr>
<tr>
<td></td>
<td>Assigning all users the Post Office Administrator role will allow them access to the global search function. They will not necessarily be required to take Actions under the Post Office, but will have the ability to search globally. (Section 4.1.1).</td>
</tr>
<tr>
<td><strong>Assigning Roles</strong></td>
<td>An officer from Disability Learning and Support will assign roles as advised.</td>
</tr>
<tr>
<td><strong>Bulk Assignment</strong></td>
<td>Bulk Assignment appears in the pop-up screen when selecting one of the options in the Actions drop-down menu list. By selecting multiple students at a time, you can choose Bulk Assignment. This will auto-populate all other rows with the same information you have currently selected.</td>
</tr>
<tr>
<td><strong>Checking progress of an Access Request for a school</strong></td>
<td>The school can view the progress of an Access Request and Priorities at any time through My Access Requests.</td>
</tr>
<tr>
<td><strong>Clearing House search filters</strong></td>
<td>The various search functions under the My Clearing Houses tab allow Users to locate Access Requests that fit specific criteria. To limit searching through lines of returned data, filters can separate Priorities before and after the Panel.</td>
</tr>
<tr>
<td>HINT</td>
<td>Detail</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Clearing House: After Access Request Panel</td>
<td>A Priority that has been returned from a Panel is noted in <em>My Clearing Houses</em> by the arrow pointing to the left, <em>My priorities back from Panel</em>. Section 8.6 explains the final three columns P1, P2 and P3.</td>
</tr>
<tr>
<td>Clearing Houses</td>
<td><em>My Clearing Houses</em> is only visible to the Clearing House Coordinator.</td>
</tr>
<tr>
<td>Clearing Houses: After the Access Request Panel</td>
<td>Clearing House Coordinators assigned P2 and P3 can read and view the <em>Priority</em> recommendations from the Panel, but the CHC (AR/P1 Owner) is the only role that can action them from this point.</td>
</tr>
<tr>
<td>Clearing Houses: Allocating to Access Request Panels</td>
<td>Priorities cannot be allocated to an Access Request Panel after its Available End Date. This must be at the minimum one day prior to the Panel meeting.</td>
</tr>
<tr>
<td>Clearing Houses: Clearing House Administrator</td>
<td>The Clearing House Administrator is the only role that can search for Clearing Houses under <em>Administer Clearing Houses</em>.</td>
</tr>
<tr>
<td>Clearing Houses: Searching under My Clearing Houses</td>
<td>Search results will only appear for Access Requests and Priorities assigned to your Clearing House/s. When searching by student, you must know at least one field for any results to appear. This search function would be used when trying to locate a specific Access Request for a student assigned to your Clearing House. To search across all Access Requests, refer to Section 4.1.1 which details searching in the Post Office.</td>
</tr>
<tr>
<td>Criteria: Change Saved Criteria</td>
<td>You may wish to slightly change the content of saved criteria if you need more or less fields. Select the saved criteria, make the changes and save it with a different name.</td>
</tr>
<tr>
<td>Criteria: Load Criteria</td>
<td>Note that the prompt about loading criteria is not relevant to the <em>AR Summary</em> Report. This Report is automatically generated and does not allow for tailoring. To tailor a Report, select <em>AR Custom Report</em>.</td>
</tr>
<tr>
<td>Deferred: After the Access Request Panel</td>
<td>The program will only allow you to reassign a Deferred Priority to a Panel at a future date. This is the only Status that can be reassigned to a Panel.</td>
</tr>
<tr>
<td>HINT</td>
<td>Detail</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Extract Data for Letters</td>
<td>Data from an Access Request can be extracted into an Excel file for a mail merge in <em>Microsoft Office: Word</em> to create letters. Appendix 6 highlights how to use mail merge in <em>Microsoft Office: Word</em>. The ability to Extract Data for Letters can be done from the Post Office, My Clearing House or the Reports tab.</td>
</tr>
<tr>
<td>Finalising the Access Request</td>
<td>When it is determined which Priority/s is supported, tick boxes reviewed and stakeholders are satisfied, CHC (AR/P1 Owner) finalises the Access Request by changing the Access Request Status from <em>In Progress</em> to <em>Completed</em> or <em>Declined</em>. This is the last step and the Access Request is now inactive.</td>
</tr>
<tr>
<td>History Information</td>
<td>With different priorities being directed to different Clearing Houses and Panels, an Access Request can be in multiple stages at any given time.</td>
</tr>
<tr>
<td></td>
<td>The History icon will always show the history of a Priority or an Outcome. The <em>AR Summary</em> Report will summarise an Access Request, including the history of each of the Priorities and Outcomes. To get the <em>AR Summary</em> Report, select a student, select the action <em>Generate Report</em>, and then select <em>AR Summary</em>. Detailed instructions are at Section 4.11.</td>
</tr>
<tr>
<td>Home Screen</td>
<td>Information on the <em>Home Screen</em> will change according to the latest system updates and news.</td>
</tr>
<tr>
<td>Integration Funding Support</td>
<td>A P2 Integration Funding Support provision is marked as <em>Supported</em> and <em>Reviewed</em>, and P1 is marked as <em>Deferred</em>. The P1 may become <em>Supported</em> and P2 Integration Funding Support provision changes to <em>Supported (On Hold)</em> and then <em>Supported (No Further Action)</em>. If this occurs, an email will be automatically generated to alert State Office about the change in Priority Status of the Integration Funding Support application.</td>
</tr>
<tr>
<td>Email notification re change in status of Priority</td>
<td></td>
</tr>
<tr>
<td>Interim (Emergency) Panel (ongoing)</td>
<td>The Interim (Emergency) Panel (ongoing) is generally set up with a longer start and end date range. It usually ends one week before the end of the school year. The meeting date should be entered as a day in the last week of the school year. The Panel functions in a similar way to other Panels.</td>
</tr>
<tr>
<td>Multiple Entries</td>
<td>Multiple Access Requests can be assigned to the same Clearing House at a time, just select more than one student/Priority (tick boxes).</td>
</tr>
<tr>
<td>HINT</td>
<td>Detail</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td><strong>One Access Request per Student</strong></td>
<td>A student can only have one active Access Request at any given time.</td>
</tr>
<tr>
<td><strong>P1 Focus</strong></td>
<td>The main focus of the Access Request is on P1. P1 will always be addressed by the CHC (AR/P1 Owner) after it has been returned from the Panel.</td>
</tr>
<tr>
<td><strong>Access Request Panel: Allocating Priorities</strong></td>
<td>Priorities can only be allocated to a Panel prior to the Panel meeting. The Available End Date, entered when the Panel was first set up (can be edited) is the date after which no additional priorities can be assigned to that Panel. The meeting date must occur after the Available End Date.</td>
</tr>
<tr>
<td><strong>Access Request Panel authority</strong></td>
<td>Panel Convenors can only edit the Placement Panels they are assigned to as the Convenor. A Panel Administrator can edit all Panels.</td>
</tr>
<tr>
<td><strong>Access Request Panel Members</strong></td>
<td>Panel Members can view and download information, review the content and contribute to Panel Meetings. They do not Action any of the Priorities. The Panel Administrator and Panel Convenor can add new Members, if required. Members can be added to a Panel up until the end of the Panel Meeting date.</td>
</tr>
<tr>
<td><strong>Access Request Panel Priority Outcome Checkbox</strong></td>
<td>The Access Request Panel Priority Outcome cannot be Saved as Completed until all three checkboxes are ticked to ensure all sections have been assessed. Select Save as Draft when you need to save your work, but have not yet completed assessing the Priority.</td>
</tr>
<tr>
<td><strong>Access Request Panel Priority Outcome Screen</strong></td>
<td>If you ticked multiple Priorities for students from My Access Request Panels in which to enter data, only one Priority screen will appear at any given time. The top right-hand side of the screen will detail which Priority you are looking at with the Student Name and the Priority (P1, P2, P3). Note that some student names may appear two to three times (followed by P1, P2 or P3) if more than one Priority is allocated to that Panel.</td>
</tr>
</tbody>
</table>
### HINT

<table>
<thead>
<tr>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Access Request Panel Convenor can <em>Save as Draft</em> rather than <em>Save as Completed</em> if they have not completed work on the <em>Panel Priority Outcome</em> screen.</td>
</tr>
</tbody>
</table>

While Panel Priority Outcomes are saved as *Draft*, they are not visible to any other user, including the Clearing House Coordinator (AR/P1 Owner). They only become visible when they are saved as *Completed*. |

### Access Request Panel Summary Report

<table>
<thead>
<tr>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Panel Convenor may give Members a copy of this for the Meeting in a PDF version so that they can make comments against each Priority.</td>
</tr>
</tbody>
</table>

### Access Request Panel: Return to Clearing House

<table>
<thead>
<tr>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1 may have been considered by the Panel before P2 and P3, depending on the meeting dates.</td>
</tr>
</tbody>
</table>

If P1 is *Supported* and the CHC (AR/P1 Owner) is confident that this will be accepted by stakeholders, they may suggest that the Panel Convenor return P2 and P3 to the Clearing House/s. This would be done through the Action *Return to Clearing House* and not proceed to the Panel. |

P2 and P3 can only be returned to the Clearing House prior to the Panel or when the Priority Outcome has a *Draft* status. |

### Access Request Panel: View Members

<table>
<thead>
<tr>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can only manage Members if you are the Panel Administrator or Panel Convenor. Otherwise, <em>View Members</em> will appear instead of <em>Manage Members</em>.</td>
</tr>
</tbody>
</table>

[View Members]

### Access Request Panel: Viewing Multiple Panels

<table>
<thead>
<tr>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you have selected multiple Panels to view in the <em>Panel Summary</em>, you can scroll to each Panel summary at the top right-hand side of the pop-up screen:</td>
</tr>
</tbody>
</table>

### Access Request Panels: Completing

<table>
<thead>
<tr>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>You cannot change the status of a Panel to <em>Completed</em> if there are still active Priorities assigned to it.</td>
</tr>
</tbody>
</table>

### Access Request Panels: Interim (Emergency) Panels (ongoing)

<table>
<thead>
<tr>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Interim (Emergency) Panel (ongoing) is generally set up with a longer start and end date span, usually one week before the end of the school year. The meeting date should be entered as a day in the last week of the school year. The Panel functions in a similar way to other Panels.</td>
</tr>
<tr>
<td>HINT</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td><strong>Pre-Panel Meeting</strong></td>
</tr>
<tr>
<td><strong>Access Request Panels: Searching in My Access Request Panels</strong></td>
</tr>
<tr>
<td><strong>Access Request Panels: Viewing Priorities not Assigned to You</strong></td>
</tr>
<tr>
<td><strong>Post Office: Viewing All Available Entries</strong></td>
</tr>
<tr>
<td><strong>Priorities</strong></td>
</tr>
<tr>
<td><strong>Priorities: Assigning P2, P3</strong></td>
</tr>
<tr>
<td><strong>Post Office Administrator Actions</strong></td>
</tr>
<tr>
<td>HINT</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td><strong>Clearing House, it is up to the CHC (AR/P1 Owner) to action.</strong></td>
</tr>
<tr>
<td><strong>Be specific when you are naming reports so they are easy to find in the future.</strong></td>
</tr>
<tr>
<td><strong>If you have previously Saved Criteria, follow the steps detailed in Section 11.3 about loading saved criteria for Reports.</strong></td>
</tr>
<tr>
<td><strong>Any Clearing House Coordinator can request that their Priority/s be Returned to the Clearing House from the Panel. The Placement Panel Convenor can action this if the Priority is either before the Panel Meeting or if Panel Priority Outcome still has a Draft Status</strong></td>
</tr>
<tr>
<td><strong>The Return to School option can be taken as an action or as a request:</strong></td>
</tr>
<tr>
<td>- Post Office Administrator action as Withdrawn</td>
</tr>
<tr>
<td>- Action: CHC (AR/P1 Owner) under the Clearing House</td>
</tr>
<tr>
<td>- Request: Clearing House Coordinator (P2, P3) in My Clearing House through Manage Priority Status</td>
</tr>
<tr>
<td>- Request: Panel Convenor in My Access Request Panel through Return to School Request</td>
</tr>
<tr>
<td>The CHC (AR/P1 Owner) will assess whether to pursue the Return to School Action or whether the Access Request should proceed given the higher order Priorities.</td>
</tr>
<tr>
<td>When an Access Request is resubmitted by a school after a Return to School Action, it will be actioned through the Post Office. It does not go directly back to the Clearing House.</td>
</tr>
<tr>
<td><strong>If an Access Request is sent back to school through the Action: Return to School before or during a Panel Meeting (i.e. when the Panel Priority Outcome still has a Draft status), the Priority cannot be sent directly back to the same Panel by the program.</strong></td>
</tr>
<tr>
<td>However, it is possible:</td>
</tr>
<tr>
<td>- Assign the Priority to the Interim (Emergency) Panel (ongoing) for a decision</td>
</tr>
<tr>
<td>- Assign the Priority to another available Panel.</td>
</tr>
<tr>
<td>HINT</td>
</tr>
<tr>
<td>-------------------------------</td>
</tr>
<tr>
<td>Screen Appearance</td>
</tr>
<tr>
<td>Searching by Student</td>
</tr>
<tr>
<td>Searching hints</td>
</tr>
<tr>
<td>Start and End Dates</td>
</tr>
<tr>
<td>State Office IFS Report</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>State Office: More Information</td>
</tr>
<tr>
<td>Submitted Not Assigned</td>
</tr>
<tr>
<td>Transfer to Another Post Office</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>HINT</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td><strong>Upload attachment:</strong> School</td>
</tr>
<tr>
<td><strong>Upload attachments:</strong> Educational Services Attachments</td>
</tr>
<tr>
<td><strong>Viewing Access Requests from Other areas</strong></td>
</tr>
<tr>
<td><strong>Viewing All Available Results</strong></td>
</tr>
<tr>
<td><strong>Viewing area</strong></td>
</tr>
</tbody>
</table>
| **Withdraw Access Request** | 1. An Access Request will generally only be withdrawn at the request of the school, parent(s) or carer(s). The *Withdraw an Access Request* option can be taken as an action or as a request:  
- **Action**: area Administrator under the Post Office  
- **Action**: CHC (AR/P1 Owner) under the Clearing House  
- **Request**: Clearing House Coordinator (P2, P3) under the Clearing House through *Manage Priority Status*  
- **Request**: Panel Convenor under the My Access Request Panel through *Return to Clearing House*  
To *Withdraw an Access Request* will remove it from consideration. You will need to be sure before withdrawing the Access Request.  
2. When the Access Request is actioned as *Withdraw*, it is returned to the school’s *My Access Requests* with a Status of *Withdrawn by Principal Network (Inactive)*. The Access Request will no longer be part of the *Panel Process*. The school can reactivate the Access Request within 12 month of its creation date. It can then be submitted to the Post Office. |
Appendices

Appendix 1: Table of Statuses

The following tables list and explain the different statuses across the Access Request Process:

- All Access Request Statuses
- Access Request statuses as part of the Access Request Process
- Status of Priority
- Individual Access Request Panel
- Creating a Clearing House
- Creating a Access Request Panel

1.1. Access Request Statuses as part of the Access Request Process

<table>
<thead>
<tr>
<th>Access Request Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>• An Access Request was submitted to the Post Office</td>
</tr>
</tbody>
</table>
| In Progress           | • Priority 1 of an Access Request has been assigned to a CHC (AR/P1 Owner) by the Post Office Administrator in the Post Office  
                        | • An Access Request remains In Progress in the Clearing House and the Access Request Panel until a final determination of Completed or Declined is received from the Owner |
| Completed             | • Final determination status actioned by the Clearing House  
                        | • In the school’s My Access Requests (inactive) |
| Declined              | • Final determination status actioned by the Clearing House  
                        | • In the school’s My Access Requests (inactive) |
1.2. All Access Request Statuses – AR1 and AR2

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>• Initial status of an Access Request</td>
</tr>
<tr>
<td>Open</td>
<td>• When the provision request has been completed</td>
</tr>
<tr>
<td>Validated</td>
<td>• All sections (before the School Principal sign off) have been signed/completed by the participants</td>
</tr>
<tr>
<td>Submitted</td>
<td>• An Access Request was submitted to the Post Office</td>
</tr>
<tr>
<td>Validated open</td>
<td>• Had reached validated status and principal declined specific sections</td>
</tr>
<tr>
<td>Withdrawn (By Principal Network)</td>
<td>• An Access Request was withdrawn by the Post Office or Clearing House Coordinator</td>
</tr>
<tr>
<td>Withdrawn (Automatically)</td>
<td>• An Access Request was withdrawn by the system (more than 12 months from creation date)</td>
</tr>
<tr>
<td>Withdrawn (By Parent)</td>
<td>• An Access Request was withdrawn by the parent</td>
</tr>
<tr>
<td>Withdrawn (By School)</td>
<td>• An Access Request was withdrawn by the school</td>
</tr>
<tr>
<td>In Progress</td>
<td>• An Access Request is being assessed by the Access Request Process</td>
</tr>
<tr>
<td>Completed</td>
<td>• A Completed Access Request, returned from Access Request Process</td>
</tr>
<tr>
<td>Declined</td>
<td>• A Declined Access Request, returned from Access Request Process</td>
</tr>
</tbody>
</table>
### 1.3. Status of Priority

<table>
<thead>
<tr>
<th>Status of Priority</th>
<th>Description</th>
<th>Location of Priority</th>
<th>Action drop-down menu item</th>
<th>Responsible Role</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To Be Assigned</strong></td>
<td>Priority 1 with CHC (AR/P1 Owner) – other Priorities not yet assigned to CHC</td>
<td>CH</td>
<td><a href="#">Assign to CH</a></td>
<td>Automatic</td>
</tr>
<tr>
<td><strong>Assigned to Clearing House</strong></td>
<td>Priority is assigned to a CH by area Administrator through the PO or CHC (AR/P1 Owner) through the CH</td>
<td>PO to CH</td>
<td>Assign to CH (Post Office Administrator in PO) Assign Priorities to CH (CHC (AR/P1 Owner) in My CH)</td>
<td>Automatic</td>
</tr>
<tr>
<td><strong>Assigned to Panel</strong></td>
<td>Priority is assigned to a Placement Panel</td>
<td>CH to Panel</td>
<td>Assign Priorities to Panel (CHC (AR/P1 Owner) in My CH)</td>
<td>Automatic when a Priority is assigned to a Panel</td>
</tr>
<tr>
<td><strong>Withdrawn</strong></td>
<td>Any CHC can identify a Priority to Withdraw Only the CHC (AR/P1 Owner) can action the request Generally requested by parent(s)/carer(s) or school</td>
<td>Panel to CH or CH</td>
<td><a href="#">Request: Manage Priority Status</a> (CHC (P2, P3) in My CH or PPC in My AR Panel) <a href="#">Action: Return to School</a> (CHC (AR/P1 Owner) in My CH)</td>
<td>CHC (P2, P3) or Panel Convenor</td>
</tr>
<tr>
<td><strong>Return to School</strong></td>
<td>Any CHC or Panel Convenor can initiate a Return to School request – more detail required.</td>
<td>Panel to CH or CH</td>
<td><a href="#">Request: Manage Priority Status</a> (CHC (P2, P3) in My CH or PPC in My AR Panel)</td>
<td>CHC (P2, P3) Panel Convenor</td>
</tr>
</tbody>
</table>

---

*Note: [Assign to CH](#) refers to assigning a priority to a Clearing House (CH) through the PO or CHC (AR/P1 Owner) through the CH.*

*Note: [Request: Manage Priority Status](#) and [Action: Return to School](#) can be initiated by CHC (P2, P3) or Panel Convenor.*
<table>
<thead>
<tr>
<th>Status of Priority</th>
<th>Description</th>
<th>Location of Priority</th>
<th>Action drop-down menu item</th>
<th>Responsible Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supported</td>
<td>The Panel Supported the Priority</td>
<td>Panel to CH</td>
<td>Panel Priority Outcome (PP Convenor in My PP) / Manage Priority Status (CHC) (AR/P1 Owner) in My CH</td>
<td>Panel Convenor</td>
</tr>
<tr>
<td>Deferred</td>
<td>The Access Request Panel Deferred the Priority and it is waiting to be reassigned to a further Panel if there is no outcome to a higher order Priority. When the Priority Status is changed from Supported to Deferred if stakeholders are not satisfied with Supported Priority, e.g. location</td>
<td>Panel to CH</td>
<td>Access Request Panel Priority Outcome (Panel Convenor in My Access Request Panel) / Manage Priority Status (CHC) (AR/P1 Owner) in My CH</td>
<td>Panel Convenor</td>
</tr>
</tbody>
</table>

Only the CHC (AR/P1 Owner) can action the request. Can be in CH, Access Request Panel before it meets or if Priority outcome has been saved as Draft.
<table>
<thead>
<tr>
<th>Status of Priority</th>
<th>Description</th>
<th>Location of Priority</th>
<th>Action drop-down menu item</th>
<th>Responsible Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Declined</td>
<td>The Panel Declined the Priority</td>
<td>Panel to CH</td>
<td>Panel Priority Outcome (Convenor in My Access Request Panel) Manage Priority Status (CHC (AR/P1 Owner) in My CH)</td>
<td>Panel Convenor</td>
</tr>
<tr>
<td>Supported (On Hold)</td>
<td>The Priority is Supported by the Panel. It is waiting for decision of a higher order Priority which is also Supported by the Panel.</td>
<td>CH</td>
<td>Manage Priority Status (CHC in My CH)</td>
<td>CHC (P2, P3) CHC (AR/P1 Owner)</td>
</tr>
<tr>
<td>Supported (No Further Action)</td>
<td>The Priority was previously Supported or Supported (On Hold) Supported (No Further Action). This cannot be undone.</td>
<td>CH</td>
<td>Manage Priority Status (CHC (AR/P1 Owner) in My CH)</td>
<td>CHC (AR/P1 Owner)</td>
</tr>
<tr>
<td>Deferred (No Further Action)</td>
<td>The AR is Completed and the Priority previously was Deferred</td>
<td>CH</td>
<td>Manage Priority Status (CHC (AR/P1 Owner) in My CH)</td>
<td>CHC (AR/P1 Owner)</td>
</tr>
<tr>
<td>Return to Clearing House</td>
<td>Any CHC can request a Priority to Return to Clearing House from Panel Only the CHC (AR/P1 Owner) can</td>
<td>Panel to CH</td>
<td>Action: Manage Priority Status CHC in My CH</td>
<td>CHC to Panel Convenor</td>
</tr>
</tbody>
</table>
### Status of Priority

<table>
<thead>
<tr>
<th>Status of Priority</th>
<th>Description</th>
<th>Location of Priority</th>
<th>Action drop-down menu item</th>
<th>Responsible Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>action the request Can only happen from Panel, before it meets or if Priority outcome has been saved as <em>Draft</em></td>
<td></td>
<td>Panel Convenor in Action: Return to CH</td>
<td>Panel Convenor to CHC</td>
</tr>
</tbody>
</table>

1.4. **Individual Access Request Panel Priority Outcome**

<table>
<thead>
<tr>
<th>Placement Panel Priority Outcome</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>The status of a Priority in a Panel meeting is incomplete</td>
</tr>
<tr>
<td>Completed</td>
<td>Status of a Priority has been finalised and returned from Panel to the Clearing House</td>
</tr>
<tr>
<td></td>
<td>Not able to modify ‘Completed’ Panel outcome</td>
</tr>
</tbody>
</table>

1.5. **Creating a Clearing House Status**

<table>
<thead>
<tr>
<th>Clearing House Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>A Clearing House is under construction</td>
</tr>
<tr>
<td>Available</td>
<td>Clearing House is open and priorities can be submitted to it</td>
</tr>
<tr>
<td>Completed</td>
<td>Clearing House no longer required and it is empty of priorities</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Set up in error or is not required</td>
</tr>
</tbody>
</table>

1.6. **Creating an Access Request Panel Status**

<table>
<thead>
<tr>
<th>Placement Panel Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Panel is under construction</td>
</tr>
</tbody>
</table>
### Placement Panel Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available</td>
<td>Panel is open and priorities can be submitted to it</td>
</tr>
<tr>
<td>Completed</td>
<td>All priority outcomes have been completed by the Panel and are back with the Clearing House</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Panel set up in error or not required</td>
</tr>
</tbody>
</table>

### Appendix 2: Access Request Panel Priority Outcomes

The following tables detail the information fields that are required to be filled in by the Access Request Panel for the *Panel Priority Outcome*. Priority requests fall into seven groups:

1. Itinerant Vision
2. Itinerant Hearing
3. Integration Funding Support
4. Special School, Support Classes (excl Early Intervention)
5. DE – School/Centre; DESU
6. Support Class, Early Intervention
7. Itinerant Early Intervention, Early Intervention Resource

#### 2.1. ‘Read Only’ Fields

The following *Read only* fields appear in the *Access Request Panel Priority Outcome* screen, based on detail from the Access Request.

<table>
<thead>
<tr>
<th>‘Read Only’ Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Name</td>
<td>Click to view the Access Request</td>
</tr>
<tr>
<td>SRN</td>
<td></td>
</tr>
<tr>
<td>Scholastic Year (2013)</td>
<td>Current Year</td>
</tr>
<tr>
<td>Date of Birth</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Disability Codes</td>
<td>Click to view</td>
</tr>
<tr>
<td>Disability Confirmation Expiry Date</td>
<td></td>
</tr>
<tr>
<td>‘Read Only’ Field</td>
<td>Details</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Home Address</td>
<td></td>
</tr>
<tr>
<td>Access Request Panel</td>
<td>Click to view details of Placement Panel and summary report of Priorities to be considered in current Panel. Click history icon to view history of current Priority</td>
</tr>
<tr>
<td>Verification</td>
<td>Link to Access Request verification screen</td>
</tr>
<tr>
<td><strong>Current:</strong></td>
<td></td>
</tr>
<tr>
<td>Census School</td>
<td></td>
</tr>
<tr>
<td>Shared Enrolment</td>
<td>Yes or No</td>
</tr>
<tr>
<td>Shared Enrolment School</td>
<td></td>
</tr>
<tr>
<td>Enrolment Type (Census)</td>
<td>Based on enrolment at the Census school</td>
</tr>
<tr>
<td>Sub Enrolment Type/Support Class</td>
<td></td>
</tr>
<tr>
<td><strong>Proposed:</strong></td>
<td></td>
</tr>
<tr>
<td>When provision is required</td>
<td></td>
</tr>
</tbody>
</table>

2.2. **Itinerant/Resource – Vision**

The following table explains the fields that available for completion under the *Priority Outcome* screen for the *Itinerant/Resource – Vision* Priority request.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>APV Support document signer (read only)</td>
<td>Name from Access Request</td>
</tr>
<tr>
<td>Intended Start Date</td>
<td>Select from calendar or enter dd/mm/year in full</td>
</tr>
<tr>
<td>Caseload per week (Hours and Minutes)</td>
<td></td>
</tr>
<tr>
<td>Supplementary per week Hours</td>
<td></td>
</tr>
<tr>
<td>Total Support Allocation per week (Hours and Minutes)</td>
<td>Caseload and Supplementary (Hrs and Mins) must not exceed 12.0 hours</td>
</tr>
</tbody>
</table>
### Data Entry Details

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Allocation per week (Minutes)</td>
<td>Numerical value</td>
</tr>
<tr>
<td>Monitor</td>
<td>Indicate yes or no</td>
</tr>
<tr>
<td>General Comment</td>
<td>Any additional details</td>
</tr>
<tr>
<td>Status of priority</td>
<td>Select from pull-down box</td>
</tr>
<tr>
<td>Status comment</td>
<td>Only if Declined is selected</td>
</tr>
</tbody>
</table>

### 2.3. Itinerant/Resource – Hearing

The following table explains the fields that are available under the Placement Priority Outcome screen for the Itinerant/Resource – Hearing Priority request.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>APH Support document signer (read only)</td>
<td>Name from Access Request</td>
</tr>
<tr>
<td>Intended Start Date</td>
<td>Select from calendar or enter dd/mm/year in full</td>
</tr>
<tr>
<td>Caseload per week (Hours and Minutes)</td>
<td></td>
</tr>
<tr>
<td>Supplementary per week Hours</td>
<td></td>
</tr>
<tr>
<td>Total Support Allocation per week (Hours and Minutes)</td>
<td>Caseload and Supplementary (Hrs and Mins) must not exceed 7 hours</td>
</tr>
<tr>
<td>Support Allocation per week (Minutes)</td>
<td>Numerical value</td>
</tr>
<tr>
<td>Monitor</td>
<td>Indicate yes or no</td>
</tr>
<tr>
<td>Travel Time per week (Hrs)</td>
<td>Optional</td>
</tr>
<tr>
<td>Travel Time per week (Mins)</td>
<td>Optional</td>
</tr>
<tr>
<td>General Comment</td>
<td>Any additional details</td>
</tr>
<tr>
<td>Status of priority</td>
<td>Select from pull-down box</td>
</tr>
<tr>
<td>Status comment</td>
<td>Only if Declined is selected</td>
</tr>
</tbody>
</table>
2.4. Integration Funding Support

The following table explains the fields that are available under the Placement Priority Outcome screen for the Integration Funding Support Priority request.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISTV per week (Hours)</td>
<td>Optional: Enter if known</td>
</tr>
<tr>
<td>ISTV per week minutes</td>
<td>Optional: Enter if known</td>
</tr>
<tr>
<td>ISTH per week (Hours)</td>
<td>Optional: Enter if known</td>
</tr>
<tr>
<td>ISTH per week minutes</td>
<td>Optional: Enter if known</td>
</tr>
<tr>
<td>Integration Funding Support: View profile</td>
<td>Click to view details of summary profile screen from Access Request. Scroll down to see Access Domains, comments and level</td>
</tr>
<tr>
<td>Profile supported</td>
<td>Indicate yes or no</td>
</tr>
<tr>
<td>IFS recommended proceed to State Office</td>
<td>Indicate yes or no</td>
</tr>
<tr>
<td>General Comment</td>
<td>Any additional details</td>
</tr>
<tr>
<td>Status of priority</td>
<td>Select from pull-down list</td>
</tr>
<tr>
<td>Status comment</td>
<td>Only if Declined is selected</td>
</tr>
</tbody>
</table>

2.5. Special School/Centre and Support Classes (excluding Early Intervention)

The following table explains the fields that are available under the Panel Priority Outcome screen for the Special School/Centre and Support Classes (SCAS) (excluding Early Intervention) Priority request.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intended Start Date</td>
<td>Select from calendar or enter dd/mm/year in full</td>
</tr>
<tr>
<td>Shared enrolment</td>
<td>Select yes or no</td>
</tr>
<tr>
<td>If no, name of census school</td>
<td>Use magnifying glass to select school – area restricted</td>
</tr>
<tr>
<td>If yes, name of census school</td>
<td>Use magnifying glass to select school – area restricted</td>
</tr>
<tr>
<td>If yes, name of shared</td>
<td>Use magnifying glass to select school – area restricted</td>
</tr>
</tbody>
</table>
### Data Entry Details

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>enrolment</td>
<td></td>
</tr>
<tr>
<td>School level: Enrolment Type/Support Class</td>
<td>Select from pull-down list and classes available at that school</td>
</tr>
<tr>
<td>Enrolment Type/Support Class</td>
<td>Select</td>
</tr>
<tr>
<td>Scholastic Year</td>
<td>Select</td>
</tr>
<tr>
<td>If a Special School, Pervasive Development Characteristics</td>
<td>Indicate yes or no</td>
</tr>
<tr>
<td>Factor of Need</td>
<td>Select from pull-down list and only those Factor of Needs related to selected class will show</td>
</tr>
<tr>
<td>General Comment</td>
<td>Any additional details</td>
</tr>
<tr>
<td>Status of priority</td>
<td>Select from pull-down list</td>
</tr>
<tr>
<td>Status comment</td>
<td>Only if Declined is selected</td>
</tr>
</tbody>
</table>

**2.6. Distance Education – School/Centre (students with significant support needs) and DESU**

The following table explains the fields that are available under the Panel Priority Outcome screen for the Special School/Centre and Support Classes (SCAS) (excluding Early Intervention) Priority request.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intended Start Date</td>
<td>Select from calendar or enter dd/mm/year in full</td>
</tr>
<tr>
<td>Shared enrolment</td>
<td>Select yes or no</td>
</tr>
<tr>
<td>Note: If yes to shared enrolment, census school copied from current</td>
<td></td>
</tr>
<tr>
<td>If shared enrolment</td>
<td>Use magnifying glass to select school – not Educational Services area restricted</td>
</tr>
<tr>
<td>If yes, name of shared enrolment</td>
<td>Use magnifying glass to select school – not Educational Services area restricted</td>
</tr>
<tr>
<td>If no, select census school</td>
<td>Use magnifying glass to select school – not Educational Services area restricted</td>
</tr>
</tbody>
</table>
## Data Entry Details

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Placement Type</td>
<td>Select from pull-down list and classes available at that school</td>
</tr>
<tr>
<td>Enrolment Type/Support Class</td>
<td>Select from pull-down list and classes available at that school</td>
</tr>
<tr>
<td>Scholastic Year</td>
<td>Select</td>
</tr>
<tr>
<td>Factor of Need</td>
<td>Select from pull-down list and only those <em>Factor of Needs</em> related to selected class will show</td>
</tr>
<tr>
<td>General Comment</td>
<td>Any additional details</td>
</tr>
<tr>
<td>Status of priority</td>
<td>Select from pull-down list</td>
</tr>
<tr>
<td>Status comment</td>
<td>Only if <em>Declined</em> is selected</td>
</tr>
</tbody>
</table>

### 2.7. SCAS: Early Intervention

The following table explains the fields that are available under the *Panel Priority Outcome* screen for the *SCAS: Early Intervention* Priority request.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current: Current Settings</td>
<td>Child’s current arrangements</td>
</tr>
<tr>
<td>Intended Start Date</td>
<td>Select from calendar or enter dd/mm/year in full</td>
</tr>
<tr>
<td>Shared Enrolment</td>
<td>If no, enter census school. If yes, Census school auto-completed but entry can be changed.</td>
</tr>
<tr>
<td>Census School</td>
<td></td>
</tr>
<tr>
<td>If shared enrolment</td>
<td>Use magnifying glass icon to select school – not area restricted</td>
</tr>
<tr>
<td>If yes, name of shared enrolment</td>
<td>Use magnifying glass icon to select school</td>
</tr>
<tr>
<td>If no, select census school</td>
<td>Use magnifying glass icon to select school</td>
</tr>
<tr>
<td>Number of Sessions</td>
<td>Optional</td>
</tr>
<tr>
<td>Enrolment Type/Support Class</td>
<td>Select from pull-down list only those available at school will be available</td>
</tr>
<tr>
<td>Scholastic Year</td>
<td>Select</td>
</tr>
</tbody>
</table>
### Data Entry Details

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Comment</td>
<td>Any additional details</td>
</tr>
<tr>
<td>Status of priority</td>
<td>Select from pull-down list</td>
</tr>
<tr>
<td>Status comment</td>
<td>Only if Declined is selected</td>
</tr>
</tbody>
</table>

#### 2.8. Itinerant/Resource: Early Intervention and Resource

The following table explains the fields that are available under the Panel Priority Outcome screen for the SCAS: Early Intervention Priority request.

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intended Start Date</td>
<td>Select from calendar or enter dd/mm/year in full</td>
</tr>
<tr>
<td>School Placement Type</td>
<td>Select from pull-down list</td>
</tr>
<tr>
<td>Number of Sessions</td>
<td>Optional</td>
</tr>
<tr>
<td>General Comment</td>
<td>Any additional details</td>
</tr>
<tr>
<td>Status of priority</td>
<td>Select from pull-down list</td>
</tr>
<tr>
<td>Status comment</td>
<td>Only if Declined is selected</td>
</tr>
</tbody>
</table>
Appendix 3: Email Notifications

The system automatically emails appropriate persons when certain important actions take place.

### Post Office – Access Requests in Post Office

<table>
<thead>
<tr>
<th>Action</th>
<th>Effects</th>
<th>Condition</th>
<th>Email TO</th>
<th>Email cc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer to Post Office</td>
<td>AR</td>
<td>Always</td>
<td>Snr Post Office Administrator (TO Principal Network)</td>
<td>Snr Post Office Administrator (FROM Principal Network)</td>
</tr>
<tr>
<td>Return to School</td>
<td>AR</td>
<td>Always</td>
<td>Assigned Principal</td>
<td>Snr Post Office Administrator</td>
</tr>
<tr>
<td>Withdraw AR</td>
<td>AR</td>
<td>Always</td>
<td>Snr Post Office Administrator, Assigned Principal</td>
<td></td>
</tr>
<tr>
<td>Upload Attachment</td>
<td>AR</td>
<td>Allow school to upload</td>
<td>Assigned Principal, Author</td>
<td></td>
</tr>
</tbody>
</table>

### Clearing Houses – Access Requests in Clearing Houses

<table>
<thead>
<tr>
<th>Action</th>
<th>Effects</th>
<th>Condition</th>
<th>Email TO</th>
<th>Email cc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer to Post Office</td>
<td>AR</td>
<td>P2/P3 assigned to CH then email CH Coordinator</td>
<td>Snr Clearing House Coordinator (TO Principal Network)</td>
<td>Clearing House Coordinator (P2/P3) (FROM Principal Network), Snr Clearing House Coordinator (FROM Principal Network)</td>
</tr>
<tr>
<td>Transfer to Clearing House</td>
<td>AR</td>
<td>P2/P3 assigned to CH then email CH Coordinator</td>
<td>Clearing House Coordinator (TO Principal Network)</td>
<td>Clearing House Coordinator (P2/P3) (FROM Principal Network)</td>
</tr>
<tr>
<td>Action</td>
<td>Effects</td>
<td>Condition</td>
<td>Email TO</td>
<td>Email cc</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------</td>
<td>---------------</td>
<td>---------------------------------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td>Withdraw AR</td>
<td>AR</td>
<td>P2/P3 assigned to CH then email CH Coordinator</td>
<td>Assigned Principal</td>
<td>Clearing House Coordinator (P2/P3)</td>
</tr>
<tr>
<td>Return to School</td>
<td>AR</td>
<td>P2/P3 assigned to CH then email CH Coordinator</td>
<td>Assigned Principal</td>
<td>Clearing House Coordinator (P2/P3)</td>
</tr>
<tr>
<td>Upload Attachment</td>
<td>AR</td>
<td>Allow school to upload</td>
<td>Assigned Principal, Author</td>
<td></td>
</tr>
<tr>
<td>Return to CH</td>
<td>Priority</td>
<td>Always</td>
<td>Placement Panel Convenors</td>
<td></td>
</tr>
<tr>
<td>SCAS Registration</td>
<td>Priority</td>
<td>Always</td>
<td>Srn Clearing House Coordinator (TO Principal Network)</td>
<td></td>
</tr>
</tbody>
</table>

Placement Panels – Access Requests in Placement Panels

<table>
<thead>
<tr>
<th>Action</th>
<th>Effects</th>
<th>Condition</th>
<th>Email TO</th>
<th>Email cc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return to CH</td>
<td>Priority</td>
<td>Always</td>
<td>Clearing House Coordinator</td>
<td>Srn Clearing House Coordinator</td>
</tr>
<tr>
<td>Transfer to PP</td>
<td>Priority</td>
<td>If not PrePP → PP</td>
<td>Clearing House Coordinator</td>
<td></td>
</tr>
<tr>
<td>Return to School</td>
<td>Priority</td>
<td>P2/P3 assigned to CH then email CH Coordinator</td>
<td>Clearing House Coordinator (P1)</td>
<td>Clearing House Coordinator (P2/P3), Srn Clearing House Coordinator</td>
</tr>
<tr>
<td>Upload Attachment</td>
<td>AR</td>
<td>Allow school to upload</td>
<td>Assigned Principal, Author</td>
<td></td>
</tr>
</tbody>
</table>
Administer Placement Panels – Manage Placement Panels

<table>
<thead>
<tr>
<th>Action</th>
<th>Condition</th>
<th>Email TO</th>
<th>Email cc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Meeting Notification</td>
<td>PP Available and members editable</td>
<td>Placement Panel Members</td>
<td></td>
</tr>
</tbody>
</table>

Minor Actions

<table>
<thead>
<tr>
<th>Action</th>
<th>Condition</th>
<th>Email TO</th>
<th>Email cc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports</td>
<td>Always</td>
<td>User</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 4: User Checklists

4.1.1 Post Office Administrator: Post Office tab

The area Administrator takes the following actions under the Post Office, described in the checklist below.

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>ESSENTIAL JOB TASKS:</strong></td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Assign P1 of an Access Request to a Clearing House.</td>
<td>Section 6.5</td>
</tr>
<tr>
<td></td>
<td><strong>ADDITIONAL TASKS:</strong></td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>If the Educational Services area needs to be changed, for example the family has moved, Transfer Access Request to relevant Educational Services Post Office.</td>
<td>Section 4.5</td>
</tr>
<tr>
<td>☐</td>
<td>If there is a request to Withdraw an Access Request, Withdraw Access Request.</td>
<td>Section 4.6</td>
</tr>
<tr>
<td>☐</td>
<td>Upload an Attachment:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Educational Services attachment</td>
<td>Section 4.7</td>
</tr>
<tr>
<td></td>
<td>• Allow the school to upload an attachment</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Run Reports.</td>
<td>Chapter 11</td>
</tr>
</tbody>
</table>

4.1.2 Senior Post Office Administrator: as above

In addition receives emails

4.1 Clearing House Administrator: Administer Clearing Houses tab

The Clearing House Administrator takes the following actions.

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>ESSENTIAL JOB TASKS:</strong></td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Create a new Clearing House.</td>
<td>Section 7.4</td>
</tr>
<tr>
<td>☐</td>
<td>Edit Clearing House details.</td>
<td>Section 7.4</td>
</tr>
<tr>
<td>☐</td>
<td>Change Clearing House Status to Available.</td>
<td>Section 7.4</td>
</tr>
</tbody>
</table>
4.2 Panel Administrator: Administer Panels tab

The Panel Administrator creates Panels, as well as editing their characteristics, access and features. The Panel Administrator undertakes the following actions.

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>ESSENTIAL JOB TASKS:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Creates a new Panel.</td>
<td>Section 9.3</td>
</tr>
<tr>
<td></td>
<td>☐ Completes Panels by changing the status of the Panel to <em>Completed</em> after all Priorities have been returned to the Clearing House.</td>
<td>Section 9.3</td>
</tr>
<tr>
<td></td>
<td>ADDITIONAL TASKS:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Edit Panel details.</td>
<td>Section 9.4</td>
</tr>
<tr>
<td></td>
<td>☐ Cancel Panel, if created in error.</td>
<td>Section 9.5</td>
</tr>
</tbody>
</table>
4.4.1 Clearing House Coordinator: My Clearing Houses tab

The Clearing House Coordinator can have two functions:

**Clearing House Coordinator (CHC (AR/P1 Owner))** is assigned P1 of an Access Request, and makes final actions and decisions across the Access Request.

**Clearing House Coordinator (P2, P3)**, offers recommendations and input to the process.

**Clearing House Coordinator (CHC (AR/P1 Owner))** takes the following actions.

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Assign P2, P3 (if applicable) to a Clearing House, their own or a different Clearing House.</td>
<td><strong>Section 8.4</strong></td>
</tr>
<tr>
<td>☐</td>
<td>Assign their Priority/s to a Panel.</td>
<td><strong>Section 8.6</strong></td>
</tr>
<tr>
<td>☐</td>
<td>Receive Priority/s back from Panels.</td>
<td>Chapter 10</td>
</tr>
<tr>
<td>☐</td>
<td>Communicate with stakeholders for further information, clarification and attachments.</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Assess the Priority Statuses and make final Priority Status decision.</td>
<td>Chapter 10</td>
</tr>
<tr>
<td>☐</td>
<td>Review Priorities by ticking the <em>Reviewed</em> tick-box.</td>
<td>Chapter 10</td>
</tr>
<tr>
<td>☐</td>
<td>Generate letters and other correspondence, as required, for stakeholders.</td>
<td><strong>Section 11.6.11</strong></td>
</tr>
<tr>
<td>☐</td>
<td>If support classes and special schools, initiate the SCAS registration</td>
<td><strong>Section 10.7</strong></td>
</tr>
<tr>
<td>☐</td>
<td>Run essential Reports:</td>
<td><strong>Section 11.6</strong></td>
</tr>
<tr>
<td></td>
<td>If a Support Classes and Special Schools Placement, run the necessary SCAS registrations Report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If an Integration Funding Support request, run State Office Integration FS Report to automatically send to State Office</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Receive advice back from stakeholders, including State Office if applicable.</td>
<td><strong>Section 10.12</strong></td>
</tr>
<tr>
<td>☐</td>
<td>Finalise Access Request and determine final status of the Access Request as <em>Completed or Declined</em>.</td>
<td><strong>Section 10.8</strong></td>
</tr>
</tbody>
</table>
### Optional Tasks:

- **Reassign Priority/s (including P1) to another more appropriate Clearing House if assigned in error.**  
  - Section 8.5

- **Receive any Return to School, Transfer to another area and Withdraw requests from Clearing House Coordinators (P2, P3) and Placement Panel Convenors. Assess whether to pursue action.**
  - Section 4.4

- **Return to School if more information required.**  
  - Section 4.5

- **Transfer Access Request to another area.**  
  - Section 4.6

- **Withdraw an Access Request.**  
  - Section 4.8

- **Request Return to Clearing House from Placement Panel.**  
  - Section 8.8

- **Upload an Attachment:**
  - Educational Services attachment
  - Attachment on behalf of the school
  - Allow the school to upload an attachment
  - Section 4.7

- **Run Reports.**  
  - Chapter 11 and Section 4.11

- **Initiate a SCAS registration under manager priority status or run necessary SCAS registration report.**  
  - Section 10.7 and 11.6.3

### The Clearing House Coordinator (P2, P3) takes the following actions.

### Essential Job Tasks:

- **Assign their Priority/s to a Panel.**  
  - Section 8.6

### Optional Tasks:

- **Re-Assign their Priority/s to another more appropriate Clearing House if assigned in error.**  
  - Section 8.5

- **Request the CHC (AR/P1 Owner) to Return to School, Transfer to another area (email request) or Withdraw through Manage Priority Status.**  
  - Section 8.7
4.4.2 Senior Clearing House Coordinator: as above

In addition, receives emails

4.3 Access Request Panel Convenor: My Access Request Panels tab

The Panel Convenor takes most actions under the Panel.

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>ESSENTIAL JOB TASKS:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pre-Panel Meeting: Assign Priorities to Panels through Action:</td>
<td>Section 9.2.3</td>
</tr>
<tr>
<td></td>
<td>Transfer to another Panel.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Organise Panel Meeting, including date, time and location</td>
<td>Section 9.7</td>
</tr>
<tr>
<td></td>
<td>Add Panel Members.</td>
<td>Section 9.6</td>
</tr>
<tr>
<td></td>
<td>Keep Panel Members informed about meetings and other Panel tasks.</td>
<td>Automatic</td>
</tr>
<tr>
<td></td>
<td></td>
<td>updates when editing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Meeting details.</td>
</tr>
<tr>
<td></td>
<td>Access Priorities with Panel Members</td>
<td>Section 9.1 and 9.9</td>
</tr>
<tr>
<td></td>
<td>Assign a Priority Status to each Priority, fill out Panel Priority</td>
<td>Section 9.10.5</td>
</tr>
<tr>
<td></td>
<td>Outcome screen and mark as Completed. This will then be sent to the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CHC (AR/P1 Owner) for final determinations.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Complete Panels by changing the Panel Status to Completed after</td>
<td>Section 9.8</td>
</tr>
<tr>
<td></td>
<td>all Priorities have returned to the Clearing House.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Run Panel Summary reports, as required.</td>
<td>Section 9.11 and Chapter 11</td>
</tr>
</tbody>
</table>
### ADDITIONAL TASKS:

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Transfer Priorities to another more appropriate Panel if assigned in error.</td>
<td>Section 9.10.2</td>
</tr>
<tr>
<td>☐</td>
<td>Request the CHC (AR/P1 Owner) to Return to School, Transfer to another area and Withdraw through Return to Clearing House.</td>
<td>Sections 9.10.3, 9.10.4</td>
</tr>
<tr>
<td>☐</td>
<td>Upload an Attachment:</td>
<td>Section 4.7</td>
</tr>
<tr>
<td></td>
<td>- Educational Services attachment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Allow the school to upload an attachment</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Run Reports.</td>
<td>Chapter 11</td>
</tr>
</tbody>
</table>

#### 4.4 Access Request Panel Member: My Placement Panels tab

The Panels are made up of multiple **Panel Members** who will participate in Priority decisions.

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ESSENTIAL JOB TASKS:

<table>
<thead>
<tr>
<th>Tick</th>
<th>Task</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Attend Panel Meetings.</td>
<td>Section 9.1.3</td>
</tr>
<tr>
<td>☐</td>
<td>Respond to communications from Panel Convenor.</td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td>Contribute to the assessment of Priority Status Outcomes.</td>
<td></td>
</tr>
</tbody>
</table>
Appendix 5: How to Merge Excel Data into Word Documents

When you're compiling a report or working on a project, it's sometimes easiest to collect data in a table format via Microsoft Excel. This information can easily be transferred from Excel to a document in Microsoft Word. It's simply a matter of copying the data from a Microsoft Excel document and pasting it into a Microsoft Word document.

1

Open both the Microsoft Word document and the Microsoft Excel spreadsheet in separate windows on the computer screen. Bring the Excel document to the foreground.

2

Highlight the block of spreadsheet cells to be included in the Word document. Copy the cells by hitting the Control button and "C" at the same time, or by selecting the "Copy" option underneath the "Edit" menu at the top of the screen.

3

Bring the Word document to the foreground. Position the cursor where the Excel data should be placed in the document. Go to the "Edit" menu in the Word document and select "Paste Special."

4

Wait for a box entitled "Paste Special" to pop up on the screen. Select "Paste" on the left side of the box. In the center of the box, there is a menu entitled "As." Select "Microsoft Excel Worksheet Object" under this heading. Click "OK."

5

Check the document. The Excel table should now be in the Word document, in the spot where the cursor had been placed.

Read more: How to Merge Excel Data Into Word Documents | eHow