



Education
Public Schools

Access Request Process

Disability, Learning & Support

Version: 2020

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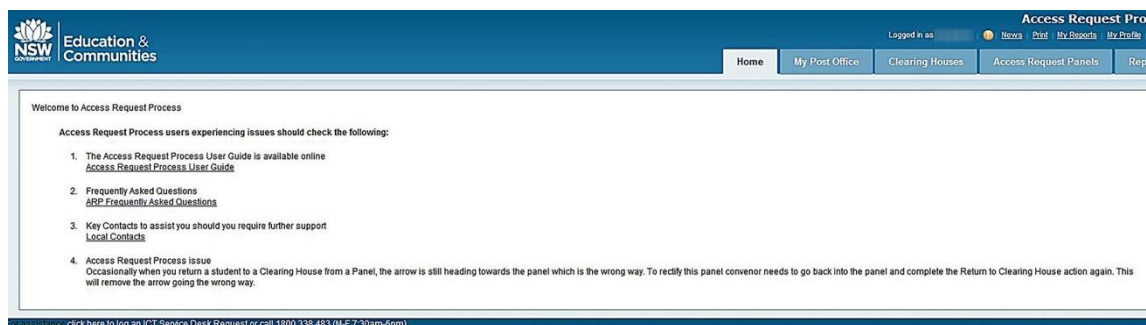
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Chapter 1 – How to Use This Guide

1.1 Purpose

This Guide explains how to use the Department of Education's (DoE) online *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* application for action by the appropriate Learning and Wellbeing 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* completes the electronic workflow once an Access Request has been submitted by the school.
















1.2 Common abbreviations









AR:	Access Request
PO:	Post Office
CH:	Clearing House
CHC:	Clearing House Coordinator
CHC (AR/P1 Owner):	Clearing House Coordinator as the Clearing House Coordinator assigned Priority 1 of an Access Request, and thus the Owner of the Access Request
Panel:	Panel
P1, P2, P3:	Priority 1, Priority 2, Priority 3
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
LWC	Learning & Wellbeing Coordinator
LWA	Learning & Wellbeing Advisor
LWO	Learning & Wellbeing Officer

1.2.1 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.

Icon	Description
	Filter
	Attachment
	Re-submitted Access Request
	School allowed to upload an attachment
	Spell checker
	Pre-Panel Meeting
	Post Office/Clearing House transfer
	Calendar
	Search
	Remove
	See drop-down menu options
	Priorities assigned to me
	My unassigned Priorities
	My Priorities assigned to Panels
	My Priorities back from Panel

	Priorities assigned to others
	Other unassigned Priorities
	Other priorities assigned to Panels
	Other priorities back from Panel
	History of Priority or outcome
	Download
	Priorities assigned to me (Return to School)
	Priorities assigned to others (Return to School)

1.3 Assigning roles to Learning and Wellbeing Personnel

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

- Generally Learning and Wellbeing Coordinators (LWC) are able to action and view all aspects of the Access Request process within their Educational Services area.
- Generally Learning and Wellbeing Officers (LWO) and Advisors (LWA) 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.

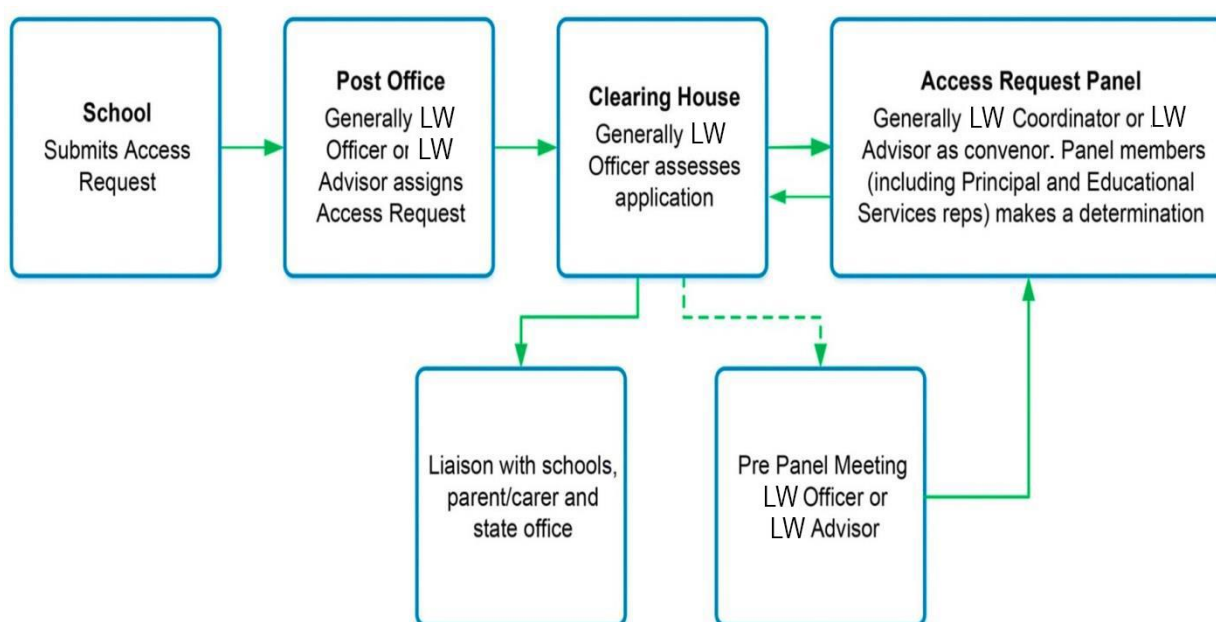
In addition Learning and Wellbeing Advisors receive specific emails related to their Principal.

1.4 Access Request Process

1.5 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*.



1.6 Statuses

There are a range of statuses throughout the *Access Request Process*. These are explained in tables in 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*

1.7 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
4. Clearing Houses: After the Panel.

These four stages are detailed below.

Stage 1: My Post Office



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.

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 Network if the student has moved*, *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. If it has been resubmitted it will have the re-submitted icon



When an Access Request is actioned as *Transfer to another Post Office*, it will be delivered first to the new principal network Post Office.

Assign P1 to Clearing House

The Post Office Administrator assigns Priority 1 (P1) of the Access Request to the appropriate Clearing House. Each clearing house is owned by a specific Learning and Wellbeing officer and their clearing house contains that access requests for the schools that they are assigned to. It is here in the Clearing House where most of the management of the Access Request is done.

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 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** or **Priority 1 Owner**).

Throughout this process, the CHC (AR/P1 Owner) may *Transfer to another Clearing House within their Educational Services*, or transfer to another *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, 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 first check the AR to ensure that the application is ready for panel. They will then assign their Priorities to either a standard formal class placement panel, to an ongoing panel, to the Interim (Emergency) Panel, a Pre-Panel meeting or a Statewide Panel.

The processes and Actions available under the Clearing House before the Panel are explained in further detail in [Chapter 8](#).

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 class panel: Can involve one or more principal networks within one Educational Services or across Educational Services. This panel will be created by the 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 have a life span and have set start and end dates.

Ongoing panel: This type of panel is used for priorities that do not require a deferred panel outcome such as integration funding support, DE priorities and itinerant support teacher sensory.

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 outcomes.

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.



PRE-PANEL MEETING:

It is up to each ES whether it has a Pre-Panel Meeting or whether the Clearing House Coordinators submit Priorities directly to the Panels.



INTERIM (EMERGENCY) PANEL (ONGOING):

The Interim (Emergency) Panel (ongoing) is generally set up with a longer start and end date span, usually ending just before the end of the term, semester or school year. They function in a similar way to a standard Panel.

The processes and Actions available under the Panel are explained in further detail in [Chapter 9](#).

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.



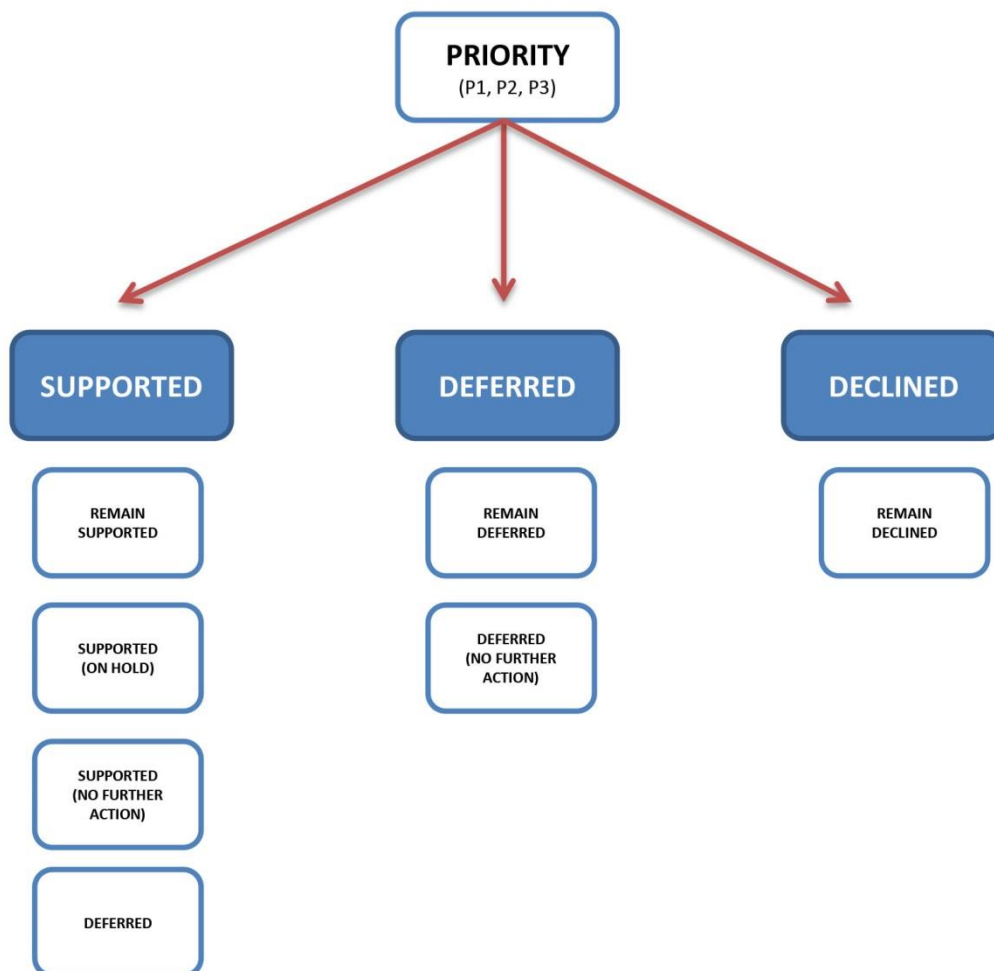
AND and OR PRIORITIES:

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 when completing the AR), or Deferred.
- Deferred: Remain Deferred, or change to Deferred (No Further Action) when completing the AR.
- 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.

Final Status of the Access Request

The CHC (AR/P1 Owner) manages the workflow of the Access Request. They will only set the status of the Access Request as *Completed* or *Declined* once the Priority Statuses are reviewed and appropriate decisions have been considered and recorded. Supported on hold becomes supported no further action and Deferred becomes deferred no further action only when the access request is about to be completed.

The processes and Actions available under the Clearing House after Panel are explained in further detail in [Chapter 10](#).



SCHOOL CAN CHECK PROGRESS:

The school can view the progress of an Access Request and Priorities at any time through *My Access Requests*.

SRN	Student Name	Status	Creation Date	Principal Sign Date	Author	Report
100000001	Smith, Johnathan	IN PROGRESS	22 Feb 2013	22 Feb 2013	SCI.TEST2	
100000002	Smith, Johnathan	IN PROGRESS	22 Feb 2013	22 Feb 2013	SCI.TEST2	
100000003	Smith, Johnathan	IN PROGRESS	22 Feb 2013	22 Feb 2013	SCI.TEST2	
100000004	Smith, Johnathan	IN PROGRESS	22 Feb 2013	22 Feb 2013	SCI.TEST2	
100000005	Smith, Johnathan	IN PROGRESS	22 Feb 2013	22 Feb 2013	SCI.TEST2	
100000006	Smith, Johnathan	IN PROGRESS	22 Feb 2013	22 Feb 2013	SCI.TEST2	

1.8 Roles and primary job functions

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

Role	Primary Job Functions
Post Office Administrator	<ul style="list-style-type: none"> Receive Access Requests in the Post Office Assign P1 to a Clearing House <i>Transfer to another Educational Services, Withdraw, or run Reports</i> <i>Upload Attachments:</i> <ul style="list-style-type: none"> <i>Educational Services attachments</i> Allow school to upload an attachment
Clearing House Coordinator (AR/P1 Owner)	<ul style="list-style-type: none"> Manage their Clearing House Assign their Priorities to Panels Assign P2 and/or P3 to themselves or another Clearing House)

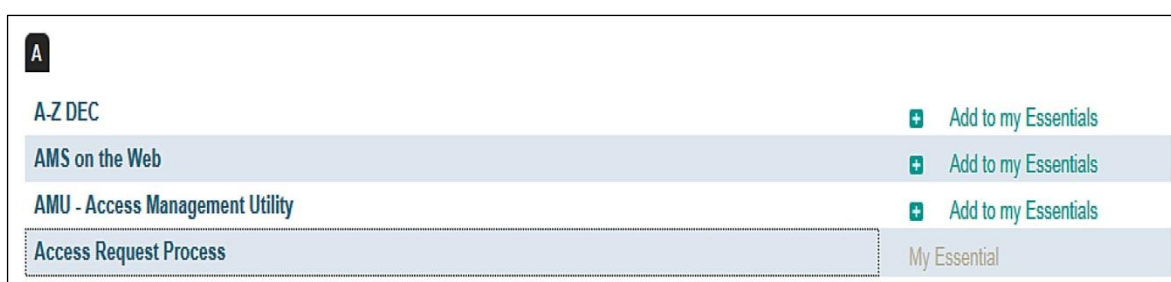
	<ul style="list-style-type: none"> • <i>Transfer, Withdraw, Return to School, Request Return to Clearing House</i> or run <i>Reports</i> • <i>Upload Attachments:</i> <ul style="list-style-type: none"> – <i>Educational Services</i> attachments – Allow school to upload an attachment • <i>Attach disability confirmation and update the disability confirmation details in the application from their clearing house</i> • 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
Clearing House Coordinator (AR/P1 Owner) – additional actions	<ul style="list-style-type: none"> • As above • In additional, receive emails: <ul style="list-style-type: none"> – 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)	<ul style="list-style-type: none"> • Manage their Clearing House • Assign their Priorities to Panels • <i>Upload Attachments:</i> <ul style="list-style-type: none"> – <i>Educational Services</i> attachments – Allow school to upload an attachment • Run Reports • Request for the CHC (AR/P1 Owner) to <i>Transfer</i> (email), <i>Withdraw</i> or <i>Return to School</i> • <i>Request Return to Clearing House</i> of their own priority from a Panel • View Statuses of individual Priorities after the Panel
Local Panel Administrator	<ul style="list-style-type: none"> • Set up Panel including Pre-Panel Meeting and Interim (Emergency) Panels (ongoing)
Panel Convenor	<ul style="list-style-type: none"> • Manage their Panels • Organise Panel Meetings and Panel Members • Assess and assign Statuses to individual Priorities • Return Priorities with updated Statuses (<i>Supported, Deferred or Declined</i>) to Clearing House • Run Reports

	<ul style="list-style-type: none">• Request for the CHC (AR/P1 Owner) to <i>Transfer, Withdraw or Return to School</i>• <i>Upload Attachments:</i><ul style="list-style-type: none">– <i>Educational Services</i> attachments– Allow school to upload an attachment
Panel Member	<ul style="list-style-type: none">• Attend Panel meetings• Participate in assigning Statuses of individual Priorities
Statewide Panel Administrator and Convenor	<ul style="list-style-type: none">• Statewide function to set up Statewide Panel and organise meetings and members.

Chapter 2 Getting started

2.1 Adding Access Request Process to your portal

Any DoE staff Member who has been granted access to the *Access Request Process* (that is, assigned a role), will see *Access Request Process* under *My applications* in the *DoE Portal*. To include the program under *Essentials*, click *Add to my Essentials*. You can also access the application through the *Access Request Process* tab in ERN.



2.2 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 *Access Request 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.

Moving between AR1 and AR2

Anyone assigned all roles will see:




The School based Panel Member will see:



2.3 System features

2.3.1 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](#).

2.3.2 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: 



The screenshot shows a table with a header row and four data rows. The header row contains a checkbox, a dropdown arrow, the text 'Family Name', another dropdown arrow, and the text 'First Name'. A red circle highlights the 'Family Name' text. The data rows contain checkboxes, icons, and text. The first data row has a checkbox, a lock icon, the text 'Alice', and the text 'Lorraine'. The second data row has a checkbox, a lock icon with a green plus sign, the text 'Lorey', and the text 'Garry'. The third data row has a checkbox, a lock icon, the text 'Marta', and the text 'Bibi'. The fourth data row has a checkbox, a lock icon, the text 'Woodford', and the text 'Tara'. Above the table is a green bar with a dropdown menu labeled 'Actions' and a 'Download' button.

<input type="checkbox"/>		Family Name	First Name
<input type="checkbox"/>	🔒	Alice	Lorraine
<input type="checkbox"/>	🔒+	Lorey	Garry
<input type="checkbox"/>	🔒	Marta	Bibi
<input type="checkbox"/>	🔒	Woodford	Tara

Chapter 3 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
- Update the disability confirm section in AR1 and upload the disability confirmation sheet
- Extracting Data for Letters
- Generating Reports
- Downloading

3.1 Using search fields

3.1.1 Searching across all Access Requests

You can only search for Access Requests across **all** stages of the process under the Post Office.

The screenshot shows the 'Access Requests in Post Office' search interface. The search criteria are:

- Principal Network: [Dropdown menu]
- School: [Dropdown menu]
- Calendar Year: 2017
- Access Request Status: SUBMITTED
- Raised By: All

 Annotations with red arrows point to these fields:

- 'Post Office is filtered by Principal Network' points to the Principal Network dropdown.
- 'You may need to check the current and previous year' points to the Calendar Year dropdown.
- 'Access Request Status: Submitted' points to the Access Request Status dropdown.

 Below the search filters is a table of search results with columns: Family Name, First Name, MF, School Year, SIN, All Status, Priority 1, All Principal Network, School Educational Services, School Principal Network, School, Submitted, and Raised By. The table contains several rows of data for students with 'SUBMITTED' status.

3.1.2 Post Office: Searching by Access Request

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.

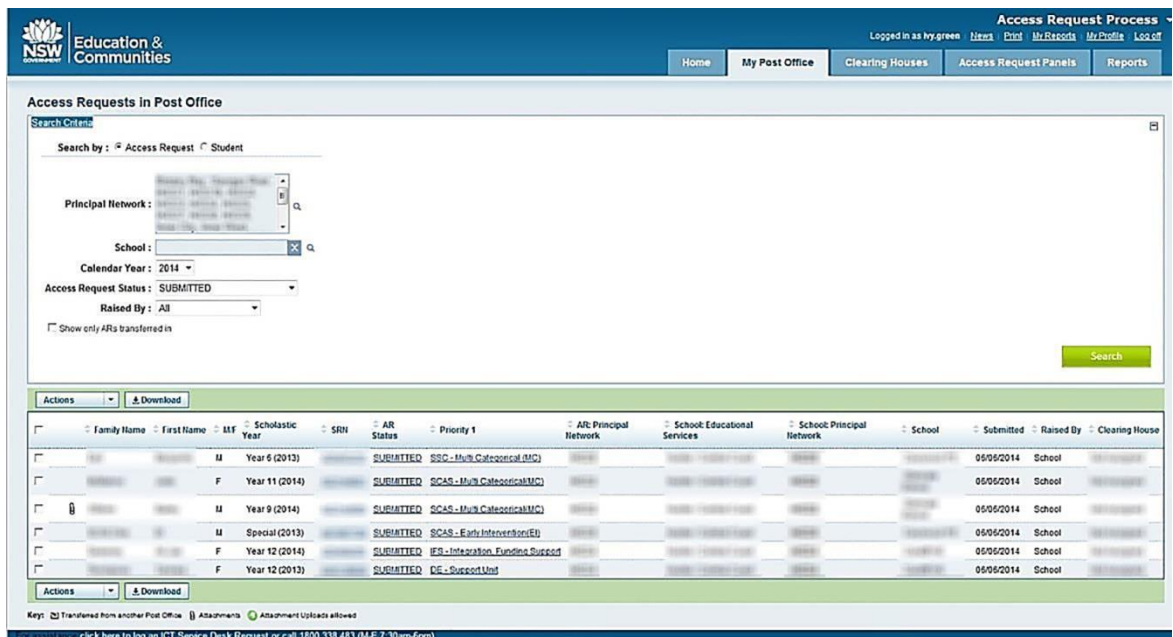
The screenshot shows a web form with the following elements:

- Access Request Status :** A dropdown menu currently set to "All".
- Raised By :** A dropdown menu with "All" selected. The visible options are: SUBMITTED, IN PROGRESS, COMPLETED, DECLINED, and WITHDRAWN (BY PRINCIPAL NETWORK).
- Show only ARs transferred

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)



3.1.3 Post Office: Searching by Student



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.

3.1.4 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.



VIEWING ALL AVAILABLE ENTRIES:

To view all results, in most instances just press *Search* without pre-selecting any fields. Double-check default search settings, as not all drop-down menu options will necessarily default to *All*.

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

Clearing House Administration

Search Criteria

Principal Networks:

Clearing House Name:

Clearing House Short Name:

Clearing House Status: All

Clearing House Coordinator:

Search

Create a Clearing House & Download

Clearing House Name	Short Name	Start Date	End Date	Principal Networks	Status	Coordinators
CH1	CH1d	25/07/2014	31/12/2999		Draft	
CH10	CH10a	29/07/2014	31/12/2999		Available	
CH11	CH11a	25/07/2014	25/07/2014		Available	
CH12	CH12	03/09/2014	31/12/2999		Available	
CH13	CH13	03/09/2014	31/12/2999		Available	
CH14	CH14	04/09/2014	31/12/2999		Available	
CH15	CH15	04/09/2014	31/12/2999		Available	
CH2	CH2d	25/07/2014	31/12/2999		Draft	
CH3	CH3d	25/07/2014	31/12/2999		Draft	
CH4	CH4d	25/07/2014	31/12/2999		Draft	
CH5	CH5d	25/07/2014	31/12/2999		Draft	
CH6	CH6d	25/07/2014	25/07/2014		Draft	
CH7	CH7d	25/07/2014	31/12/2999		Draft	
CH8	CH8a	25/07/2014	31/12/2999		Available	
CH9	CH9a	25/07/2014	31/12/2999		Available	

3.1.5 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:

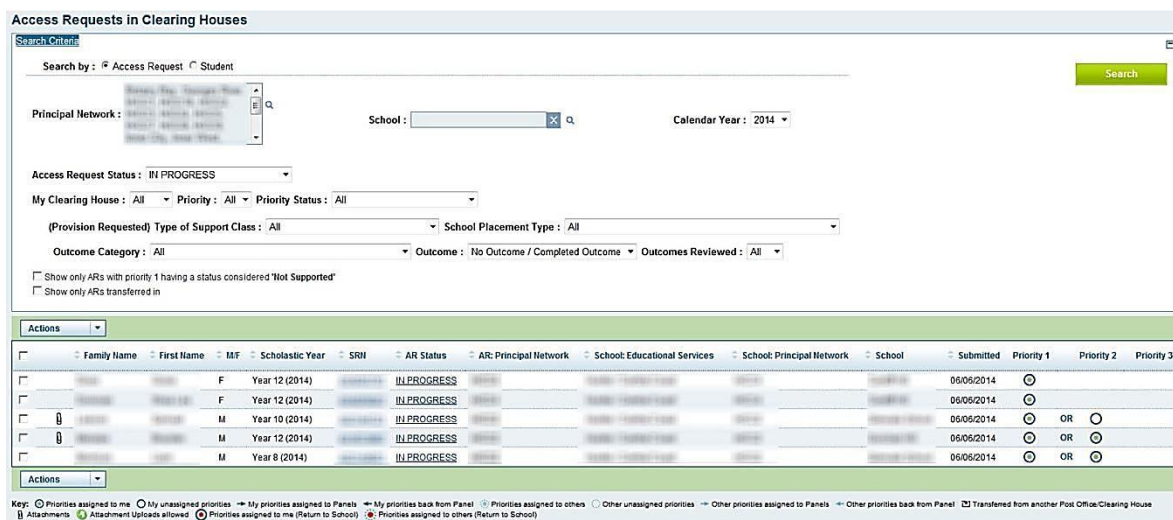
- Show only Access Requests with a Priority 1 having a status considered 'Not Supported'
- Show only Access Requests transferred in

Specific detail and hints about searching under the *Clearing Houses* tab can be found under [Section 7.5](#).

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.



3.1.6 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.

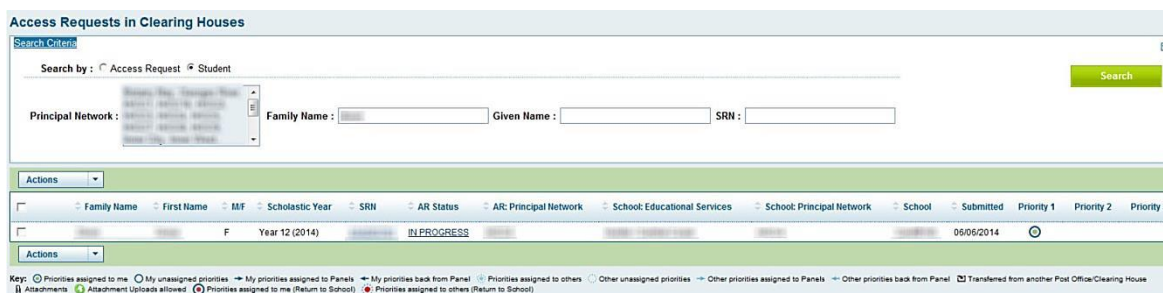
To search by student, select *Student* at the top of the search field, and fill in known data.




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.



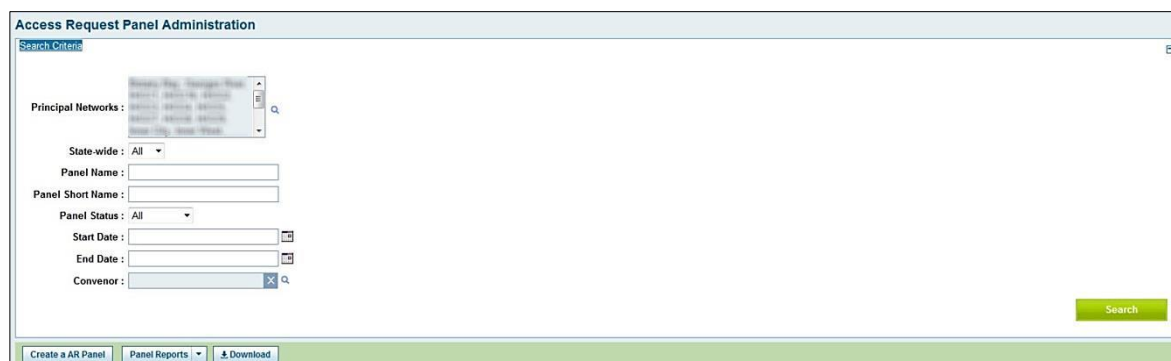
 **P1, P2 AND P3 SUMMARY:**
 The final three columns in the screenshot above for P1, P2 and P3 are explained in [Section 7.5.5](#).

3.1.7 Panel Administration: Searching for Panels

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

Panel	Short Name	Panel Type	State wide	Start Date	End Date	Principal Network	Status	Convenors	Members	Meeting Details
PP25a	PP25a	Standard	No	13/10/2014	31/12/2014	Student-Info - Manager-Panel	Available	1	0	01/01/2015 09:00 - location

3.1.8 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

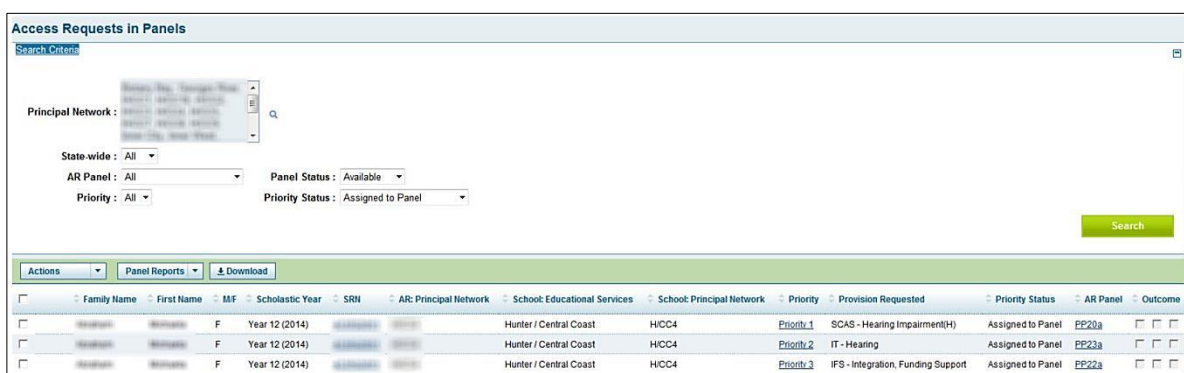
Under the *Access Request Panels >> My Access Request Panels* tab, you can search for specific Access Requests.

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

SEARCH RESULTS

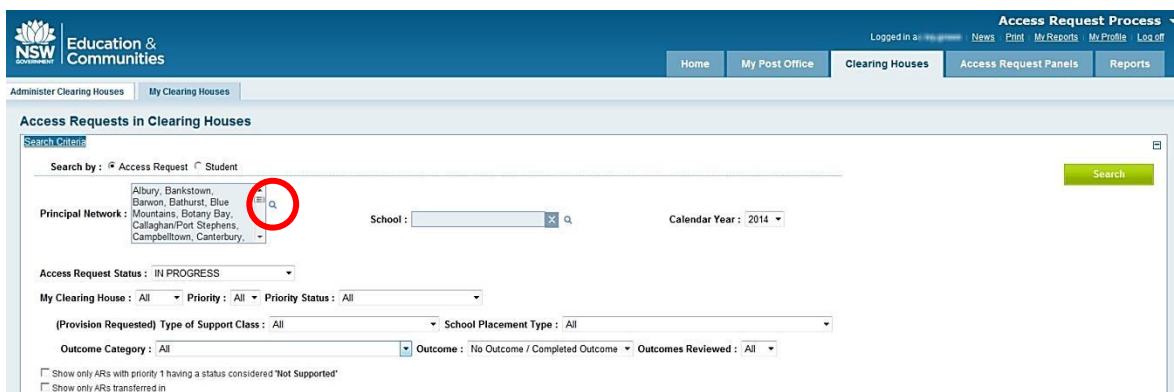
The search results will appear at the bottom of the screen and show a summary of the student details for each Priority, including:

- 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*.)

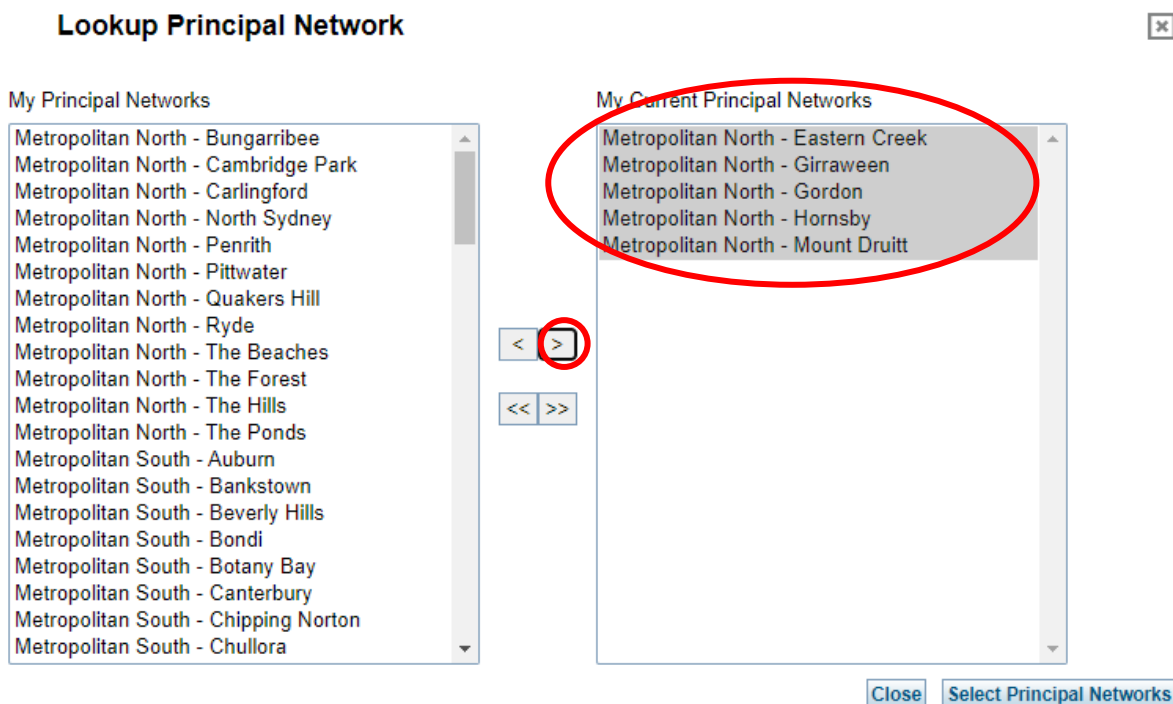


3.2 Look up Principal Network

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.



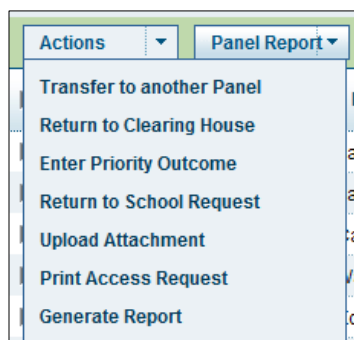
Use the arrow (e.g. move selection to right) to select the Principal Networks you currently wish to work on.

Then click Select Principal Networks.

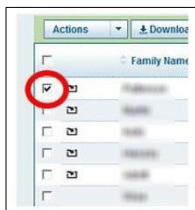
3.3 Selecting an action

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 to the left of the student's details.



You can select multiple entries to view at once in a list by ticking multiple boxes.



3.3.1 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.



3.3.2 View the Access Request verification screen

To view the verification screen of an Access Request, click on the blue hyperlink under the SRN column. You can then select and view any section of the AR application.

Actions							
<input type="checkbox"/>	Family Name	First Name	MF	Scholastic Year (2013)	SRN	Access Request Status	School Res
<input type="checkbox"/>	Anders	Stephane	F	Year 12	[SRN]	PROGRESS	Wendee (10)
<input type="checkbox"/>	Anders	Stephane	F	Year 12	[SRN]	IN PROGRESS	Wendee (10)
<input type="checkbox"/>	Anders	Stephane	M	Year 12	[SRN]	IN PROGRESS	Wendee (10)
<input type="checkbox"/>	Anders	Stephane	M	Year 5	[SRN]	IN PROGRESS	Wendee (10)
<input type="checkbox"/>	Anders	Stephane	M	Year 11	[SRN]	IN PROGRESS	Wendee (10)
<input type="checkbox"/>	Anders	Stephane	M	Year 6	[SRN]	IN PROGRESS	Wendee (10)
<input type="checkbox"/>	Anders	Stephane	F	Year 12	[SRN]	IN PROGRESS	Wendee (10)

Reviewing the AR and the 1st Priority

- Check the box to choose all students
- Check the box next to the student to choose that student
- **SRN:** click on the students SRN to see their Access Request verification screen
- Once you have opened the AR verification screen click on any section to view specific information about the student's application

- **Priority 1:** the Clearing House to assign to is determined by Priority 1 or Principal Network or by school
- **AR Status:** shows the history of the Access Request (check to see if it had been Returned to School)

3.3.3 View attachments

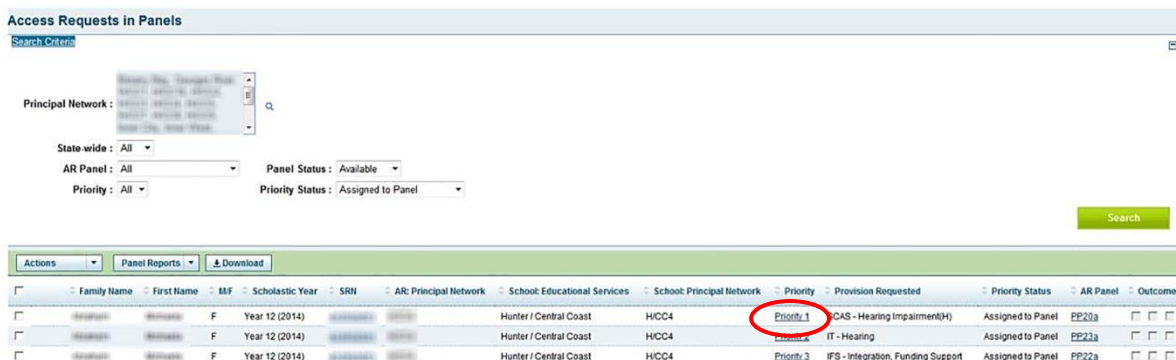
Any attachments will be marked with a paperclip next to the student's name. To view the attachment, click on the paperclip.

SCHOOL TO UPLOAD ATTACHMENT:

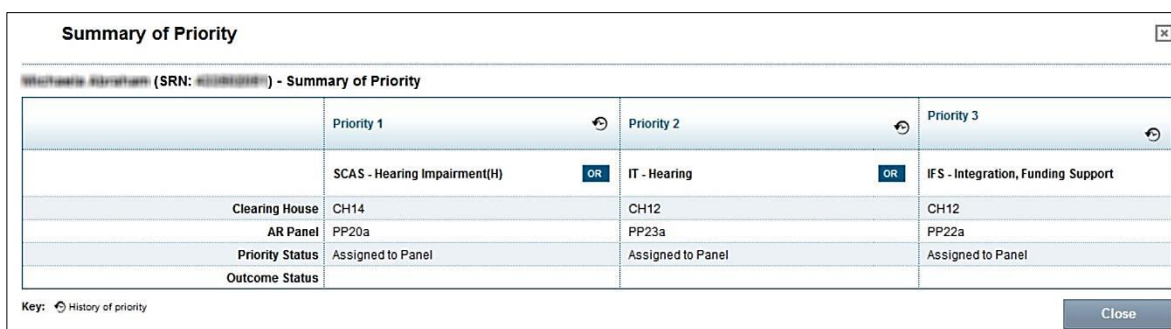
The icon means that a school needs to upload an attachment. Once the attachment is uploaded by the school, it will appear here as a paperclip.


3.3.4 View Priority details

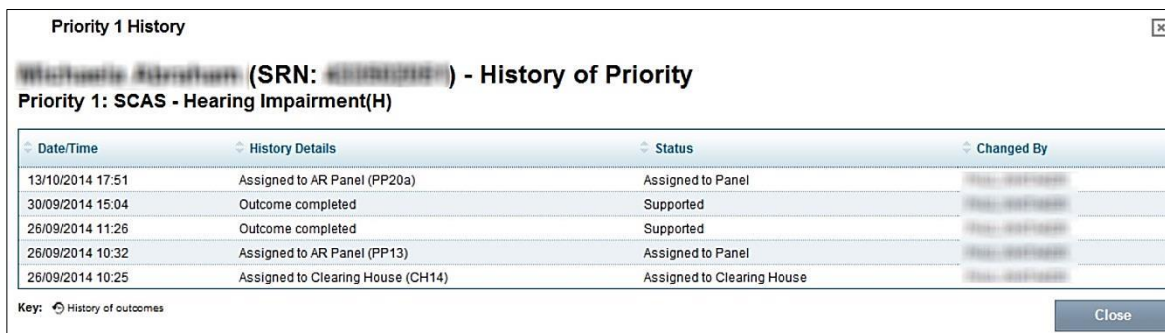
To view the details of the Priority under the Access Request, click on the blue hyperlink under the *Priority* column.




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



To view further detail, click on the *History of Priority* icon (which will exist if there is a history to retrieve) 



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.

3.4 Selecting an Action *Return to School*

The Return to School option can be taken as an **action** by either the Post Office Administrator or the priority 1 clearing house owner. Returning an access request to school after a placement panel decision should be avoided as the panel outcome is no longer visible, though it is still available under history.

3.4.1 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 the set up page is incorrect or the provisions requested need updating or if significant changes to content are required. The officer should speak to the school before taking this action. (Do not return to update a disability confirmation, to change the OR to AND between p1 and p2, or between p2 and p3, or for minor content changes).

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

- Select student name/s (tick box).
- Select *Return to School* in drop-down menu under *Actions*.
- 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. Specific instructions on which sections should be declined should be included in the email.

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

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.

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:

Return to School

- 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. ([Section 8.8](#))

3.4.3 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.

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).

3.5 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. This should only be actioned if the student and family have moved to a new area and after discussion with the advisor in the receiving area.

- **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 Action: *Return to Clearing House*
- Email from Clearing House Coordinator (P2, P3) to CHC (AR/P1 Owner) requesting transfer of Access Request.

3.5.1 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.

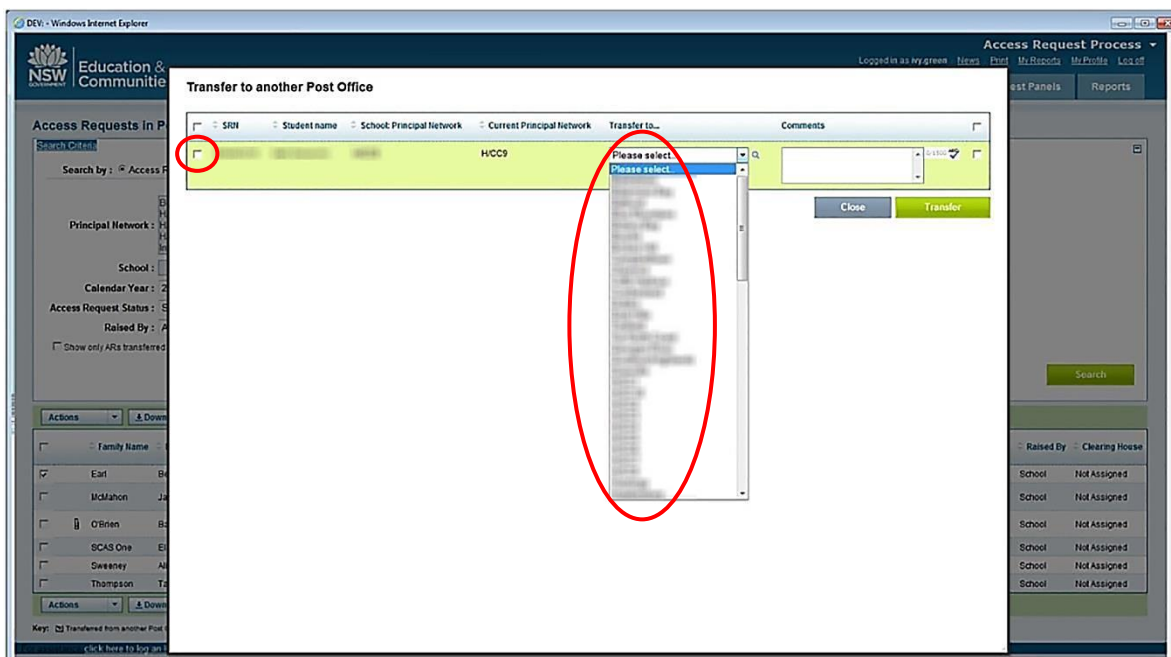
Under the *My Post Office* tab:

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

The following screen will appear:

Transfer to another Post Office

- Again, select the student name/s (tick box).
- Select which Principal Network to transfer the Access Request. Phone the other office to confirm.
- 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.

3.5.2 Clearing House Coordinator (AR/P1 Owner) Action *Transfer to another Post Office*

The CHC (AR/P1 Owner) can *Transfer* an Access Request to another Post Office if the family has moved.

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

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:

The screenshot shows a web interface titled "Transfer to another Post Office". At the top, there are several filters: SRN, Student name, School: Principal Network, and Current Principal Network. To the right, there is a "Transfer to..." dropdown menu and a "Comments" section. Below these filters is a table with columns for SRN, Student name, School: Principal Network, Current Principal Network, Transfer to..., and Comments. A search bar is located above the table. At the bottom right of the interface, there are two buttons: "Close" and "Transfer".



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 ES and the previous CHC (AR/P1 Owner).

3.5.3 Clearing House Coordinator (AR/P1 Owner) Action *Transfer to another Clearing House*

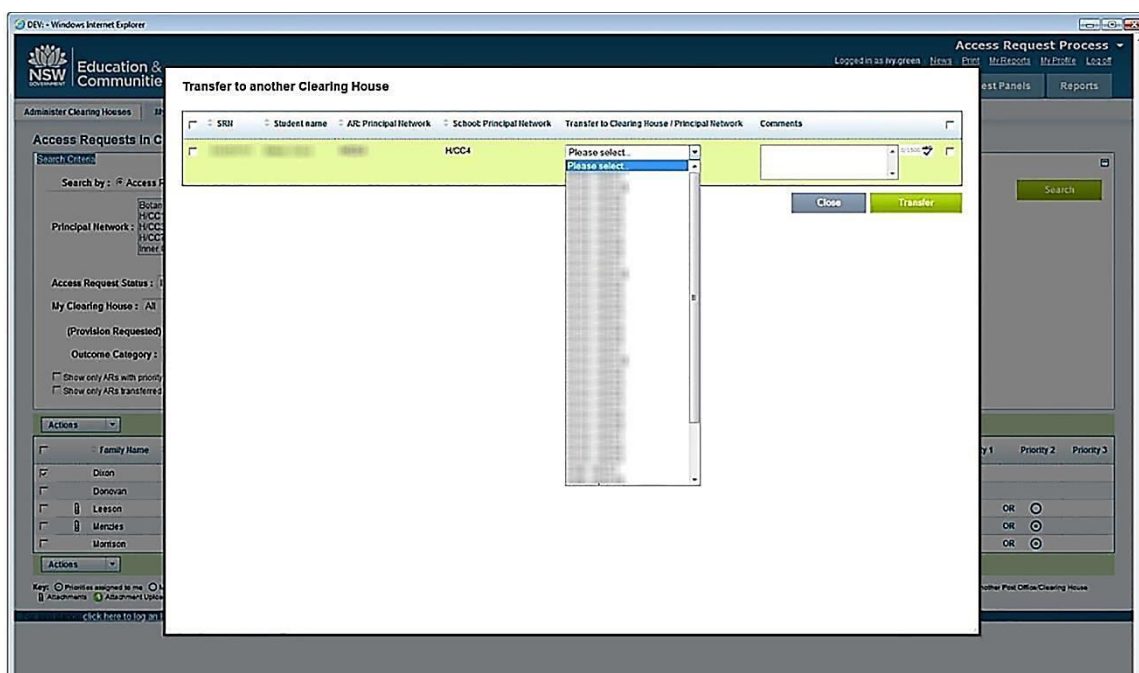
This action can only occur from the Clearing House to another Clearing House within the same Educational Services. If outside the Educational Services, use Actions: Transfer to another Post Office.

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.

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 will need to be *returned to school* to amend before a transfer can occur.

3.5.4 Panel Convenor Request *Transfer to another Post Office/Clearing House through Return to Clearing House*

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.

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).

3.6 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 Action: *Return to Clearing House*



WITHDRAW REMOVES ACCESS REQUEST:

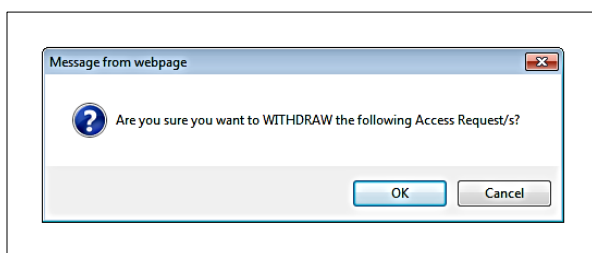
To *Withdraw an Access Request* will remove it from consideration. You will need to be sure before withdrawing the Access Request.

3.6.1 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*.

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.

3.6.2 Clearing House Coordinator (AR/P1 Owner) Action *Withdraw Access Request*

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, no provision is 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.

3.6.3 Clearing House Coordinator (P2, P3): Request withdraw Access Request

This is best achieved by email or discussion with the CHC (AR/P1 Owner).

3.6.4 Withdraw a priority

See [Section 8.10](#).

3.6.5 Access Request Panel Convenor Request Withdraw through *Return to Clearing House*

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

- Select student name/s (tick box).
- Select student name/s (tick box).

Return to Clearing House

<input type="checkbox"/>	SRN	Student name	Priority	AR Panel	Return to Clearing House	Comments
<input type="checkbox"/>			Priority 1 SCAS - Hearing Impairment(H)	PP20a	CH14	<input type="text" value=""/>

- 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).

3.7 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*:

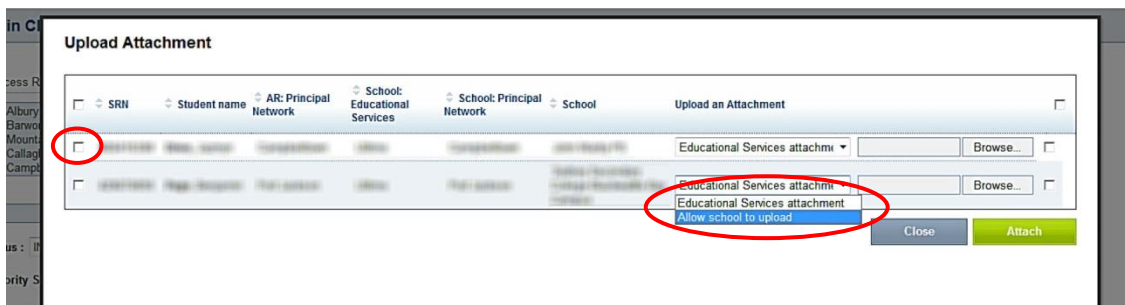
- Post Office Administrator
- Clearing House Coordinator
- Access Request Panel Convenor

3.7.1 Uploading Educational Services Attachments

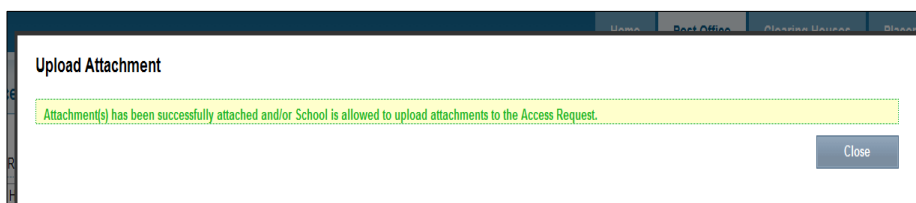
ACTIONS

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*.



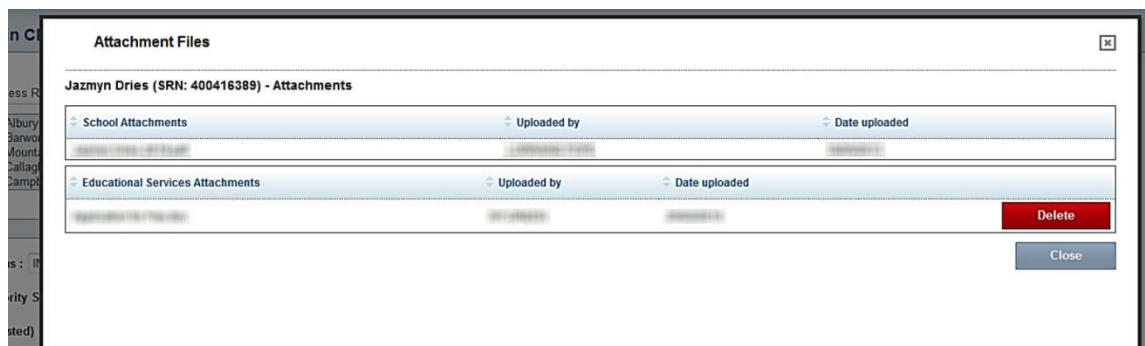
The following confirmation message will appear:



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.

3.7.2 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*.

3.7.3 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.

3.7.4 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.

3.8 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.

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

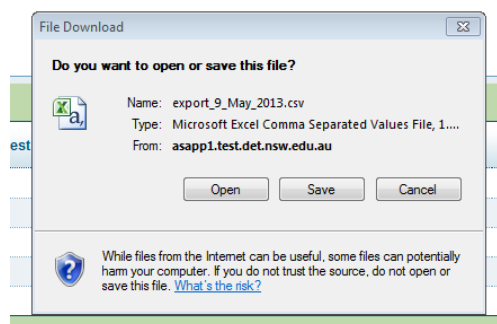
The results will appear at the bottom of the screen.

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.

3.9 Download Access Request PDF

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

- 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.

3.10 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 7](#).

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).

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.

3.10.1 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. Normally all fields are chosen.

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*.

3.10.2 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 in the 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.



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

3.11 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. The custom report also includes the student's home address, suburb and postcode.

3.11.1 Access Request Summary

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

Access Request Summary										
SRN	Family Name	First Name	Gender	Date of Birth	Access Request Status	AR Principal Network	School Principal Network	School	Submitted	Raised B
			Female	26/09/1996	IN PROGRESS	H/CC4	H/CC4		06/06/2014	School
	Priority1 IT (Vision)			Priority 2			Priority3			
Clearing House	CH9									
Access Request Panel										
Priority Status	Assigned to Clearing House									
Priority Panel Outcome Status										
	Date	History Details		Priority Status						
	26/09/14 10:30 AM	Assigned to Clearing House (CH9)		Assigned to Clearing House						
	26/09/14 11:16 AM	Assigned to AR Panel (PF13)		Assigned to Panel						
	30/09/14 4:17 PM	Outcome completed		Supported						

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

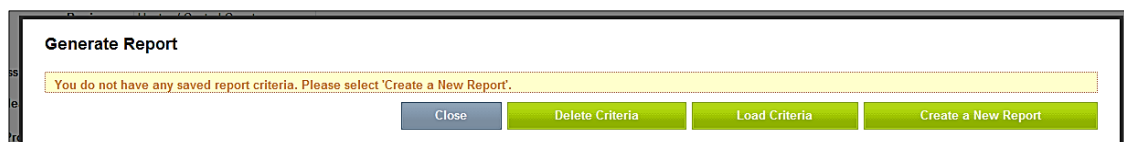
ACTIONS

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.

3.11.2 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.

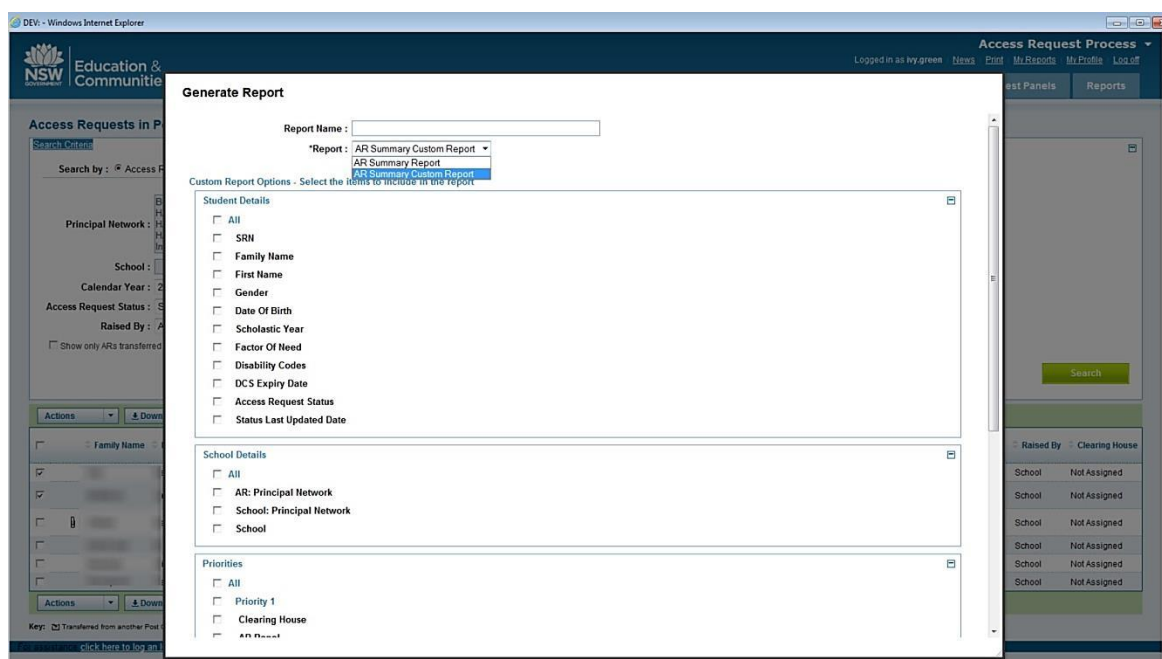
To create an Access Request Custom Report you can either:

- 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:



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)
- Student residential details

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

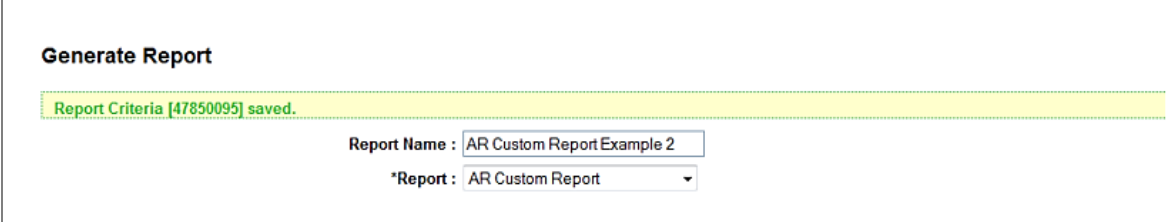
The report will be made available under *My Reports* tab and will also be emailed to you.

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:



Generate Report

Report Criteria [47850095] saved.

Report Name : AR Custom Report Example 2

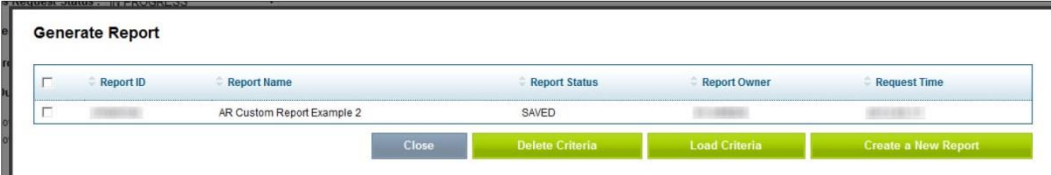
*Report : AR Custom Report

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:



Generate Report

<input type="checkbox"/>	Report ID	Report Name	Report Status	Report Owner	Request Time
<input type="checkbox"/>		AR Custom Report Example 2	SAVED		

Close Delete Criteria Load Criteria Create a New Report

- 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:

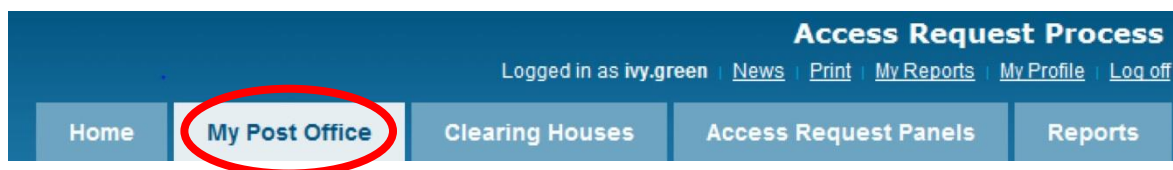
- Give the Report a different name
- Change the criteria by adding or removing tick-boxes
- If you changed the criteria, you can save that criteria as a new option by selecting *Save Criteria*.

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.

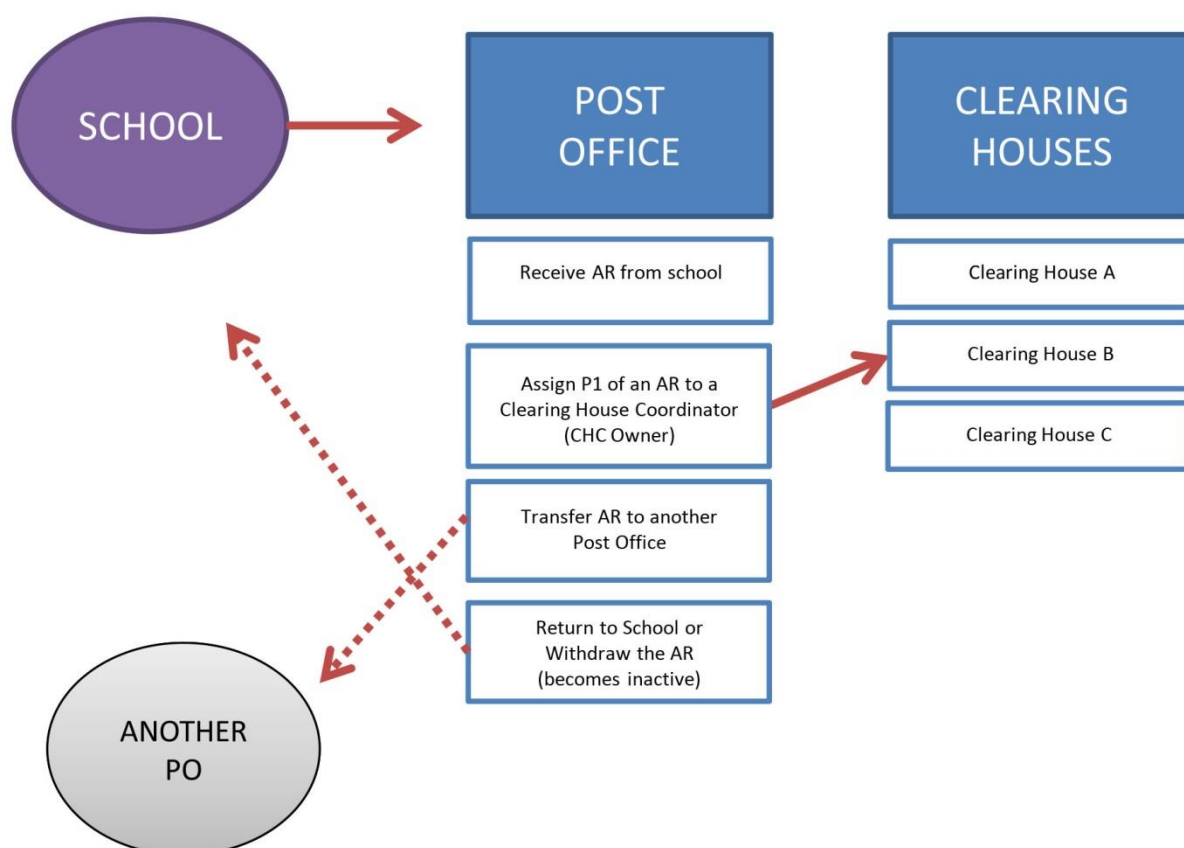
Wellbeing Coordinator or Learning and Wellbeing Advisor. This will allow personnel to action and view all aspects of the Access Request Process with their Principal Networks.

Chapter 4 Post Office



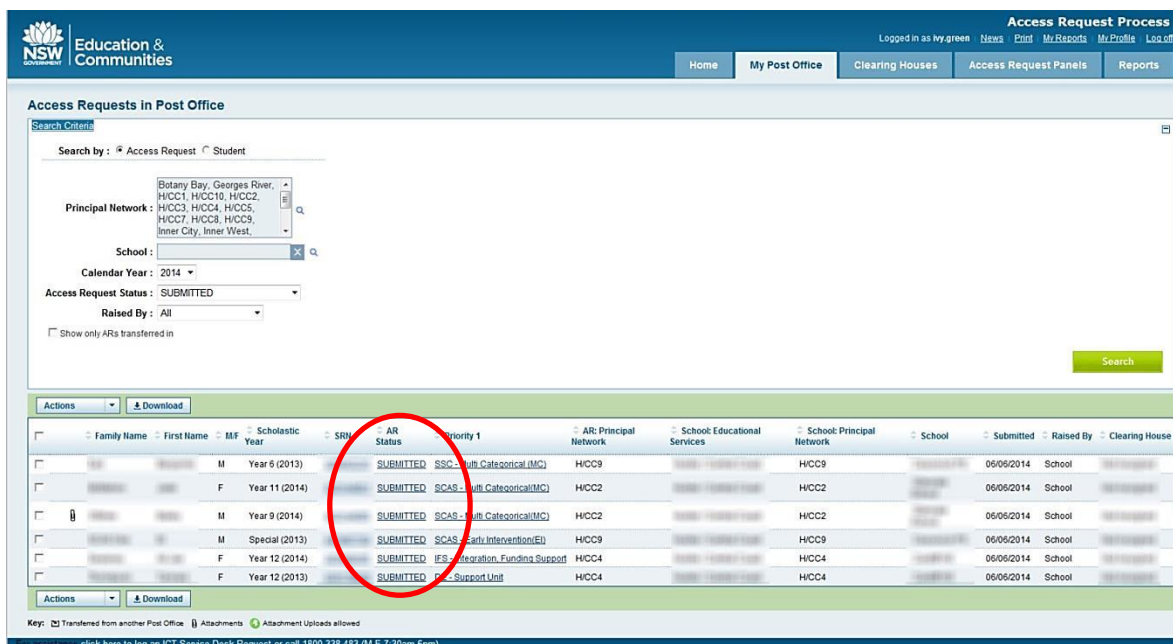
4.1 Workflow

The primary purpose of the Post Office is to receive all Access Requests from schools as part of the Educational Services, and to then assign Priority 1 (P1) to the appropriate Clearing House.



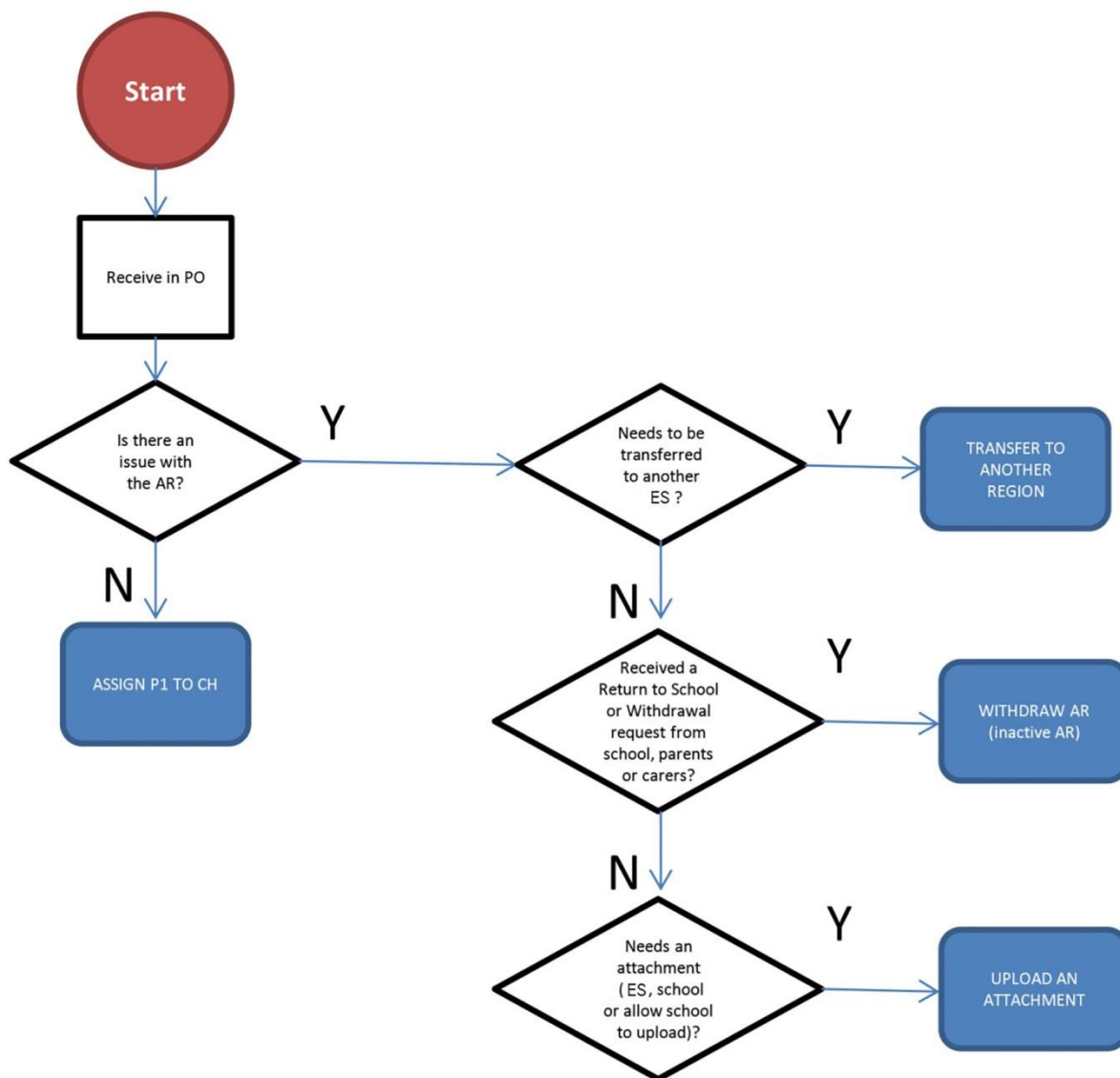
When Access Requests are *Submitted* by the Assigned Principal, they automatically appear in their respective Post Office. Before the Post Office Administrator takes any actions, the Access Request has an Access Request Status of *Submitted*.

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.



4.2 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 5](#). These actions may also be taken by the officer in the clearing house.



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.



POST OFFICE ADMINISTRATOR ACTIONS:

Post Office Administrators can action *Return to School*, *Withdraw*, *Transfer* or *Upload an Attachment request* if the Access Request has not yet been assigned to a Clearing House, that is, the Access Request status is *Submitted*.

If it has been assigned to the Clearing House, the Clearing House Coordinator (AR/P1 Owner) will Action.

4.3 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.

The screenshot shows the 'Access Requests in Post Office' search interface. The 'Access Request Status' dropdown menu is open, and the 'SUBMITTED' option is highlighted with a red circle. Other options visible include 'IN PROGRESS', 'COMPLETED', 'DECLINED', and 'WITHDRAWN (BY PRINCIPAL NETWORK)'. The 'Search by' field is set to 'Access Request', and the 'Access Request Status' is currently set to 'SUBMITTED'.



SUBMITTED AND NOT ASSIGNED:

A *Submitted* Access Request Status will show as *Not Assigned* under the *Clearing House* column.

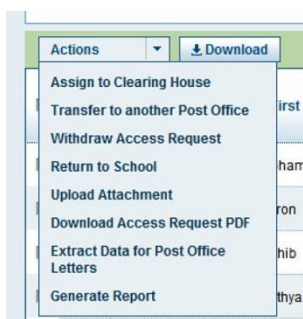
**READ ONLY:**

For the Post Office Administrator, any results that appear from a search of Access Requests that do not have a *Submitted* status, will be read-only.

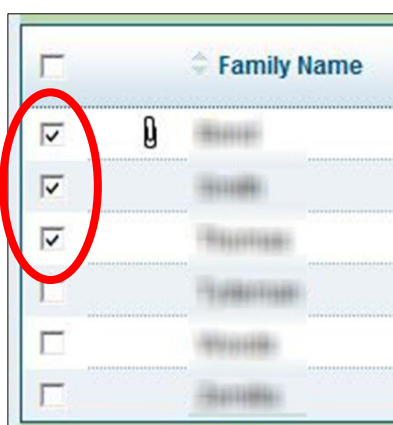
4.4 Actions

4.4.1 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. Selecting more than one name, 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](#).



Chapter 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

Bulk Assignment

Clearing House : Please select... Fill Clearing House

<input type="checkbox"/>	SRN	Student name	AR: Principal Network	School: Educational Services	School: Principal Network	School	AR Status	Priority 1	Clearing House	<input type="checkbox"/>
<input type="checkbox"/>	12345678	John Doe	Principal	School A	School B	School C	SUBMITTED	SSC - Multi Categorical (MC)	Not Assigned	<input type="checkbox"/>
<input type="checkbox"/>	12345678	John Doe	Principal	School A	School B	School C	SUBMITTED	SCAS - Multi Categorical(MC)	Not Assigned	<input type="checkbox"/>
<input type="checkbox"/>	12345678	John Doe	Principal	School A	School B	School C	SUBMITTED	SCAS - Multi Categorical(MC)	Not Assigned	<input type="checkbox"/>

Close Save

- 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.



ASSIGN TO ALL ROWS: BULK ASSIGNMENT

When selecting multiple students at a time, you can choose Bulk Assignment. This will auto-populate all other rows with the same information you are filling in for the Clearing House currently selected.

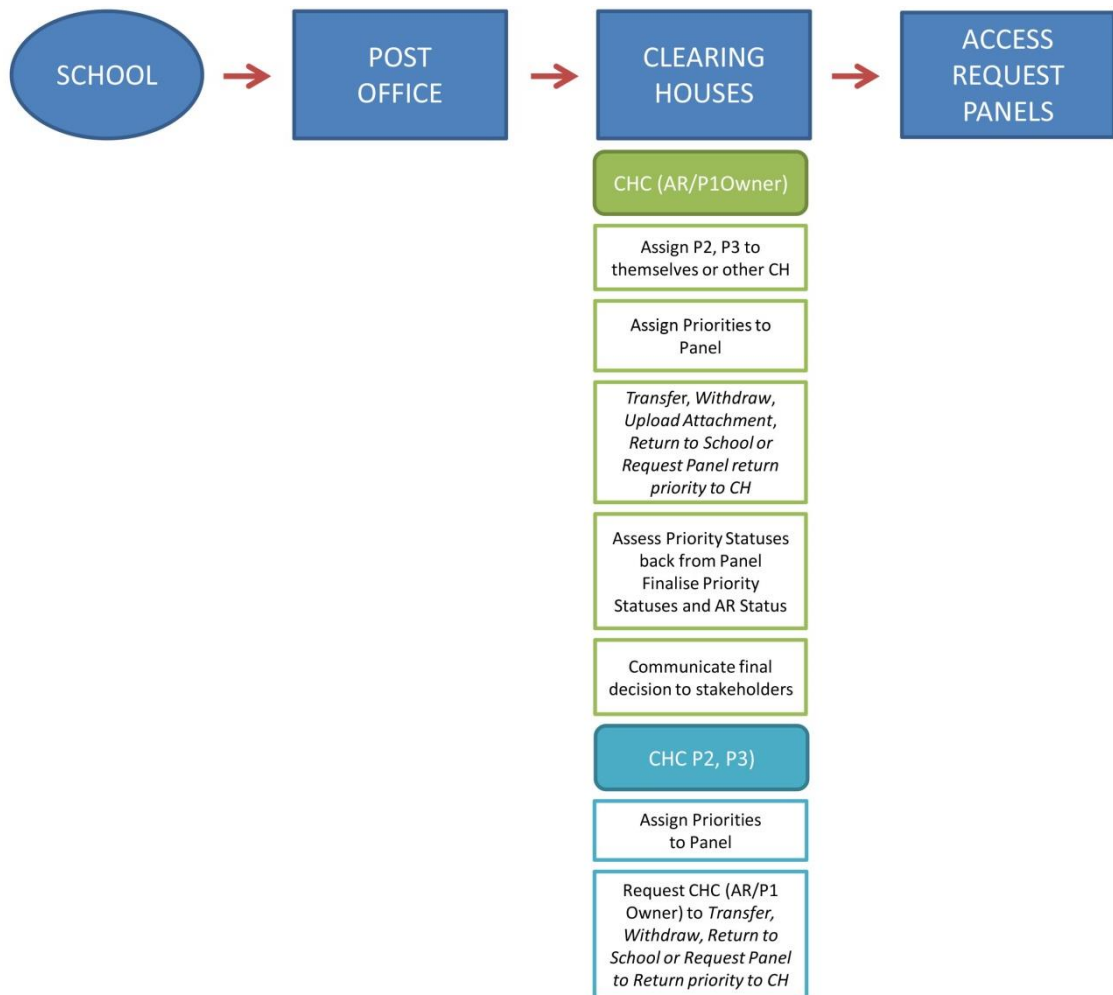
Chapter 6 Clearing Houses



6.1 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.



6.2 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:

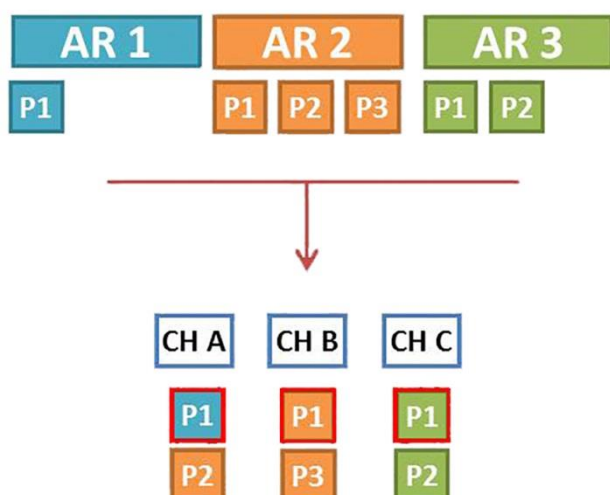
- P1 is assigned to Clearing House A by the Post Office Administrator through the Post Office.
- The Coordinator of Clearing House A becomes the CHC (AR/P1 Owner) of AR1.

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.



6.3 Clearing House Coordinator overview

Each Clearing House has a **Clearing House Coordinator or owner**. 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.

6.4 Clearing House Administrator: Creating a Clearing House under Administer Clearing Houses tab

6.4.1 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 are normally organised according to the schools assigned to the Learning and Wellbeing Officer:

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](#)).

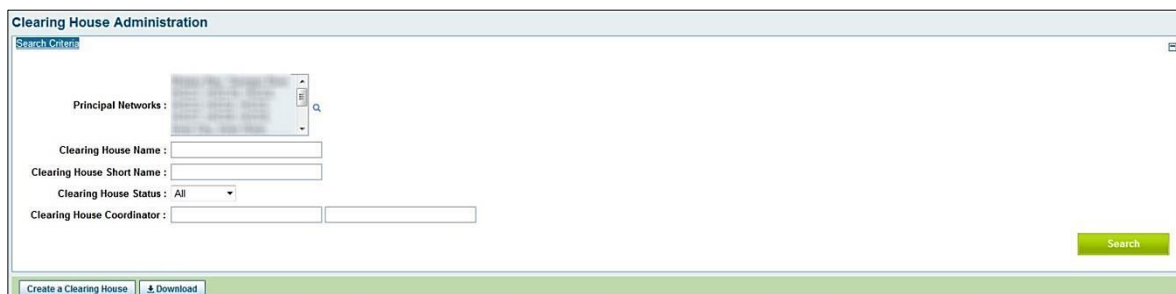
6.4.2 Locating Clearing Houses: Administer Clearing Houses

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 screenshot shows a web interface titled "Clearing House Administration" with a "Search Criteria" section. It includes a "Principal Networks" dropdown menu, a "Clearing House Name" text input, a "Clearing House Short Name" text input, a "Clearing House Status" dropdown menu set to "All", and a "Clearing House Coordinator" text input. A green "Search" button is located at the bottom right. At the bottom of the form, there are two buttons: "Create a Clearing House" and "Download".

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 screenshot shows the 'Clearing House Administration' interface. At the top, there is a 'Search Criteria' section with the following fields: 'Principal Networks' (a list box), 'Clearing House Name' (text input with 'ch10'), 'Clearing House Short Name' (text input), 'Clearing House Status' (dropdown menu with 'All'), and 'Clearing House Coordinator' (text input). A green 'Search' button is located at the bottom right of this section. Below the search criteria, there are two buttons: 'Create a Clearing House' and '& Download'. The main area displays a table of search results with columns: 'Clearing House Name', 'Short Name', 'Start Date', 'End Date', 'Principal Networks', 'Status', and 'Coordinators'. One result is visible: 'CH10', 'CH10a', '29/07/2014', '31/12/2999', 'Botany Bay, Georges River', 'Available', and a dropdown arrow. At the bottom, there are again 'Create a Clearing House' and '& Download' buttons.

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.

6.4.3 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. Most clearing houses only require a single principal network. 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.

Clearing House Administration

Search Criteria

Principal Networks : [Dropdown Menu]

Clearing House Name :

Clearing House Short Name :

Clearing House Status : All ▼

Clearing House Coordinator :

Create a Clearing House
Download

The screen to create the new Clearing House will then appear.

Create a Clearing House

Principal Networks :

*Clearing House Name : 0/128

*Short Name : 0/16

*Start Date : 21/10/2014

*End Date : 31/12/2999

Status : ▼ Draft

*Lead Coordinator 1 :

Close
Create

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*.

6.4.3.1.1 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.

Clearing House Name	Short Name	Start Date	End Date	Principal Networks	Status	Coordinator
CH1	CH1d	25/07/2014	31/12/2999	Botany Bay, Georges River, HICC1, HICC10, HICC2, HICC3, HICC4, HICC5, HICC7, HICC8, HICC9, Inner City, Inner West, Network 8, Port Hacking, SEG NOT APPLICABLE, Woronora River	Draft	

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

*Indicates mandatory field.

Select Save when completed.

6.4.4 Editing details of Clearing Houses

Clearing House details can only be edited under *Administer Clearing Houses* by the Clearing House Administrator. The principal networks can only be edited when there are no active priorities assigned.

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.

6.4.5 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*.

6.4.6 Completing a Clearing House

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

6.5 Clearing House Coordinator: *My Clearing Houses*

General search instructions are detailed under **Common Tasks** in [Section 4.1.5](#).

6.5.1 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.

The screenshot displays the 'Access Request Process' web application. The top navigation bar includes 'Home', 'My Post Office', 'Clearing Houses', 'Access Request Panels', and 'Reports'. The main content area is titled 'Access Requests in Clearing Houses' and features a search interface with various filters:

- Search by:** Access Request (selected) / Student
- Principal Network:** Albury, Bankstown, Barwon, Bathurst, Blue Mountains, Botany Bay, Callaghan/Port Stephens, Campbelltown, Canterbury.
- My Clearing Houses:** CH20a, CH21a, CH22a, CH23a, CH24a, CH25a, CH26a, CH27a, CH28a, CH29a.
- School:** [Text input field]
- Access Request Status:** IN PROGRESS
- Calendar Year:** 2014
- Priority:** All
- Priority Status:** All
- (Provision Requested) Type of Support Class:** All
- School Placement Type:** All
- Outcome Category:** All
- Outcome:** No Outcome / Completed Outcome
- Outcomes Reviewed:** All

Below the filters are two checkboxes:

 Show only ARs with priority 1 having a status considered 'Not Supported'

 Show only ARs transferred in

The results table has the following columns: Family Name, First Name, M/F, Scholastic Year, SRN, AR Status, AR: Principal Network, School: Educational Services, School: Principal Network, School, Submitted, Priority 1, Priority 2, Priority 3.

Family Name	First Name	M/F	Scholastic Year	SRN	AR Status	AR: Principal Network	School: Educational Services	School: Principal Network	School	Submitted	Priority 1	Priority 2	Priority 3
[icon]	[icon]	M	Year 6 (2013)	[icon]	IN PROGRESS	[icon]	[icon]	[icon]	[icon]	27/10/2014	[icon]	[icon]	[icon]
[icon]	[icon]	M	Year 12 (2013)	[icon]	IN PROGRESS	[icon]	[icon]	[icon]	[icon]	27/10/2014	[icon]	[icon]	[icon]
[icon]	[icon]	M	Year 8 (2014)	[icon]	IN PROGRESS	[icon]	[icon]	[icon]	[icon]	27/10/2014	[icon]	[icon]	[icon]
[icon]	[icon]	M	Year 12 (2013)	[icon]	IN PROGRESS	[icon]	[icon]	[icon]	[icon]	06/09/2014	[icon]	[icon]	[icon]
[icon]	[icon]	M	Year 12 (2014)	[icon]	IN PROGRESS	[icon]	[icon]	[icon]	[icon]	27/10/2014	[icon]	[icon]	[icon]
[icon]	[icon]	M	Year 12 (2013)	[icon]	IN PROGRESS	[icon]	[icon]	[icon]	[icon]	27/10/2014	[icon]	[icon]	[icon]

Key: [icon] Priorities assigned to me [icon] My unassigned priorities [icon] My priorities assigned to Panels [icon] My priorities back from Panel [icon] Priorities assigned to others [icon] Other unassigned priorities [icon] Other priorities assigned to Panels [icon] Other priorities back from Panel [icon] Transferred from another Post Office/Clearing House [icon] Attachments [icon] Attachment Uploads allowed [icon] Priorities assigned to me (Return to School) [icon] Priorities assigned to others (Return to School)

6.5.2 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.

6.5.3 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](#))




6.5.4 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](#))

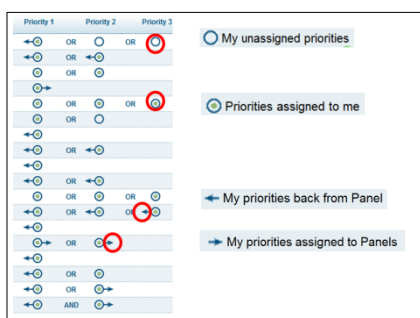
 A screenshot of a table with columns: Family Name, First Name, SRN, Year, and Access Request Status. A red circle highlights a paperclip icon next to a student's name in the SRN column.


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).

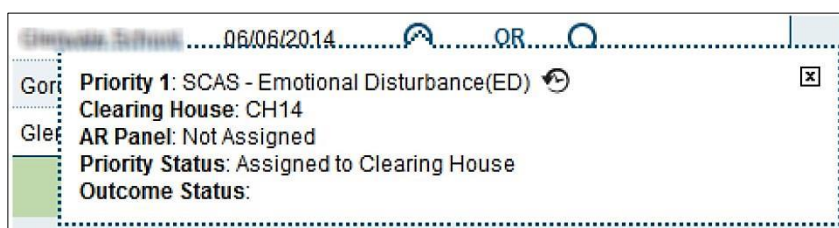
6.5.5 Viewing Priorities: quick view screen summary

A quick visual reference details the current status of the different priorities under an Access Request.

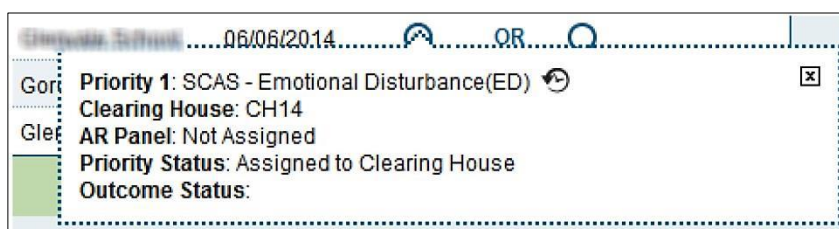


For a screen summary of each priority, hover your cursor over the priority ‘dot’.


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:




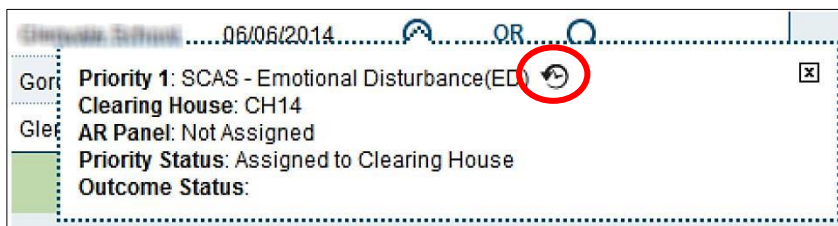
Note that this is similar to the information that appeared when you hovered over the dot, except you can:

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

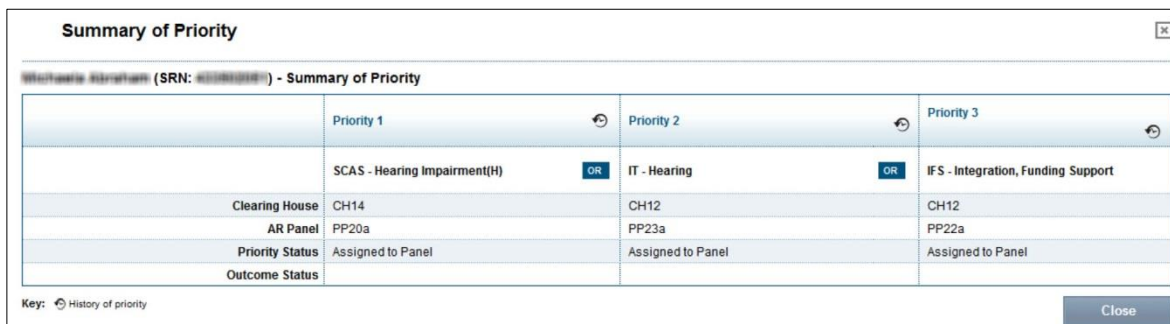
6.5.6 Viewing Priority details

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](#))

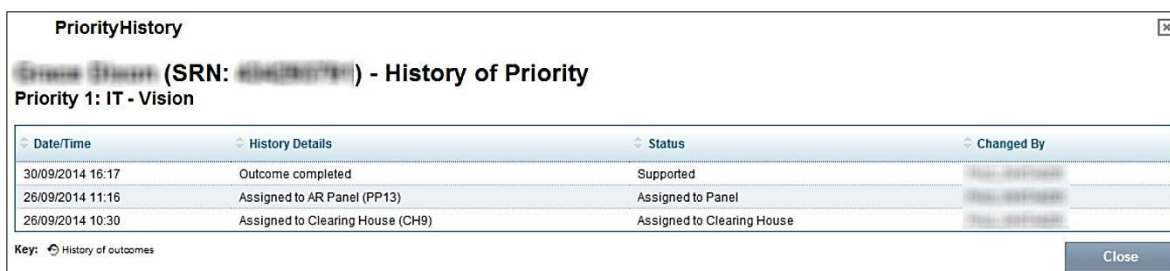
Select the symbol  next to the priority detail for more information. Whenever you see the History of Priority icon (whether in Clearing House, Access Request Panel, Access Request Panel Outcome screen etc.), you can click the icon to see the Priority History and Historical Outcomes.



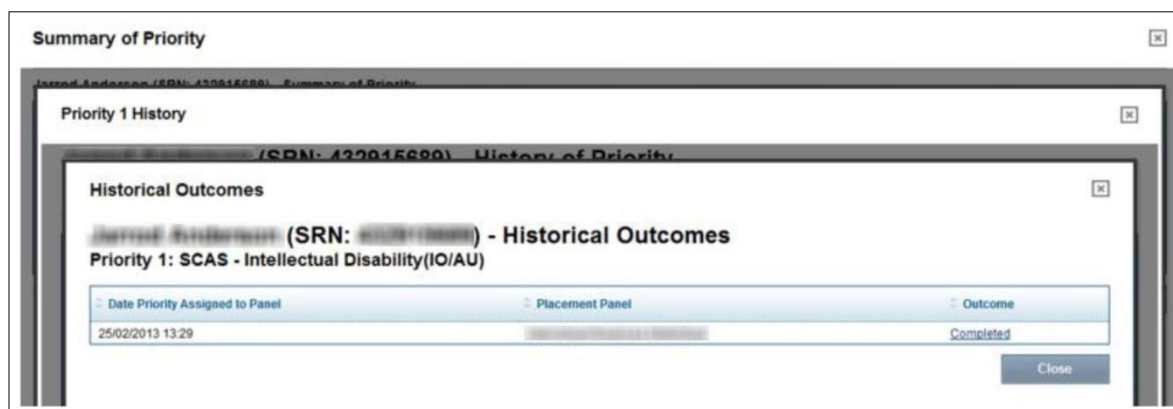
The following screen will appear, containing a summary of the Priority detail:



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.

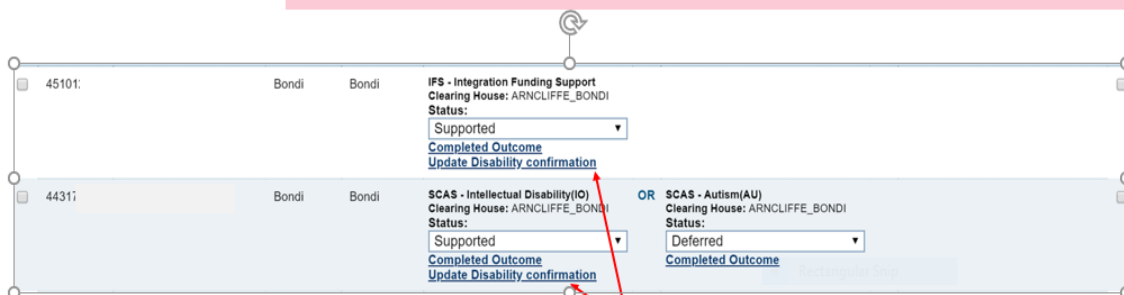


6.5.7 Update the disability confirmation section in AR1 from AR2 and attach the new disability confirmation

When a new disability confirmation sheet becomes available the priority 1 owner can update the section in AR1 and also attach the new disability confirmation sheet from their clearing house.

Updating the disability confirmation while the AR is “In Progress”

The disability section of the Access Request can be updated in the clearing house by the priority 1 owner before panel, when the priority is assigned to panel and also after panel



In Access Requests in clearing houses the priority 1 owner:

1. Selects their clearing house and searches
2. Selects the student's AR
3. Uses the Action drop down : Manage priority status

4. Clicks on the Update Disability Confirmation link

Con't: updating the disability confirmation while the AR is “In Progress”

Disability Confirmation

Disability Confirmation*

Yes

If yes, attach current disability confirmation*

Expiry Date*

02/08/2020

Special Consideration*

No

Consultation*

Yes

Disability Code*

IN1 IN2 IN3 MH1

Selected Disability Code*

AU

Other Disability/Disabilities Code

IN1 IN2 IN3 MH1

Selected Other Disability/Disabilities Code

The priority 1 owner:

5. Updates the sections of the disability confirmation that have changed
6. Selects the attachment icon to delete the old dis con and to attach the new dis con
7. Saves the section

It is very important that disability information and the attachment are updated before completing the AR as the AR is the department's main source of disability information.

Chapter 7 Clearing Houses: Before the Access Request Panel



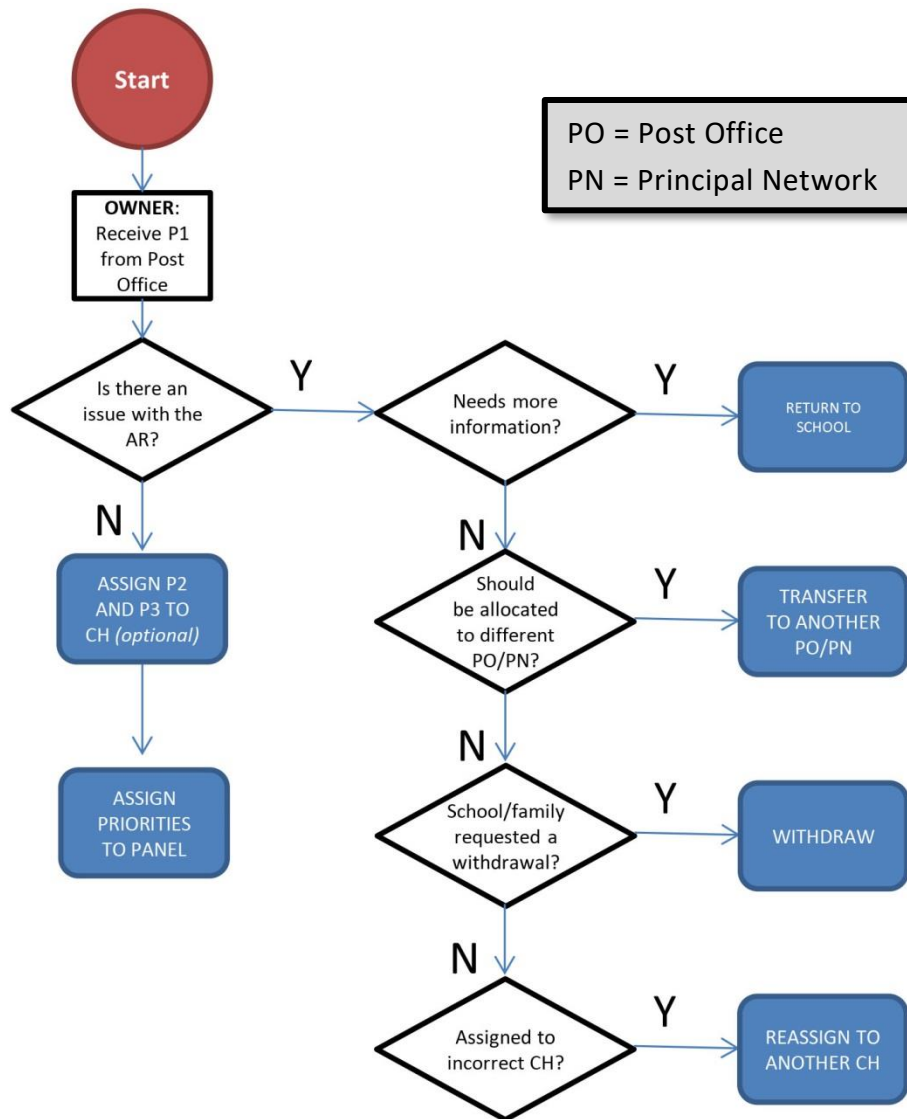
7.1 Workflow

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.

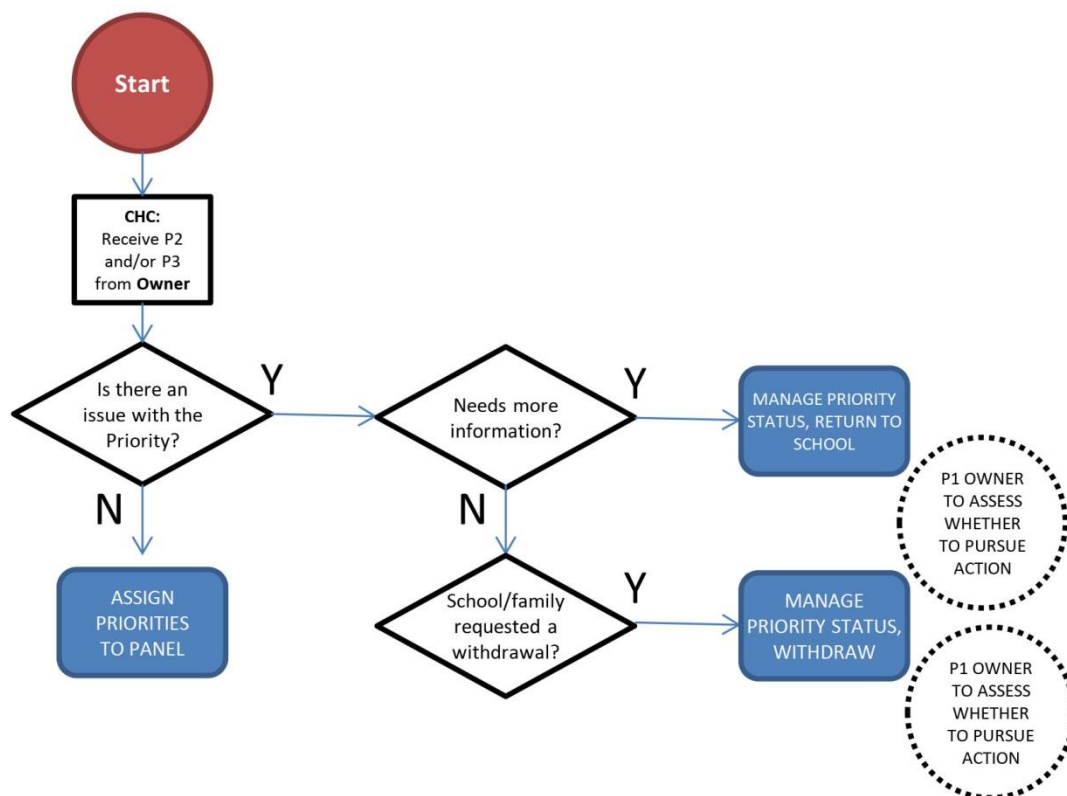
7.1.1 Clearing House Coordinator (AR/P1 OWNER) workflow

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).



7.1.2 Clearing House Coordinator (P2, P3) workflow

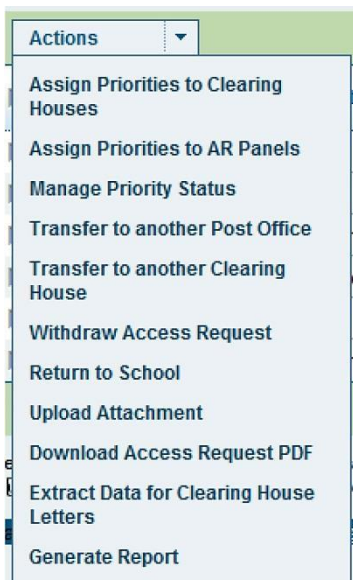
The flowchart below details the decision-making process of the Clearing House Coordinator (P2, P3).



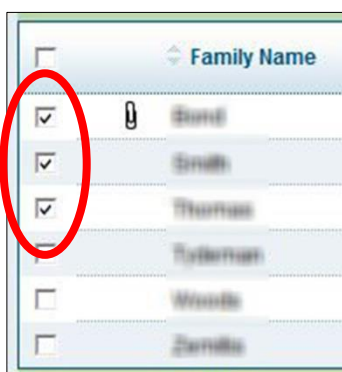
7.2 Actions

7.2.1 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. 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.



7.3 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 mainstream schools as identified in the *Provision Requested* section of the Access Request by the School Learning and Support Team. SSC relate to support classes in Schools for a Specific Purpose (SSP).
- **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:

Type of Support Class	School Placement Type
<ul style="list-style-type: none"> – Autism – Emotional Disturbance – Behaviour Disorder – Hearing Impaired – Intellectual Disability (IM) 	<p>(Note: SSC refers to Special School/Centre)</p> <ul style="list-style-type: none"> – DE – 2.8 (Students with additional learning and support needs) – DE – 2.9 (Students with significant support needs – transition)

Type of Support Class	School Placement Type
– Intellectual Disability (IO)	– DE – Support Unit
– Intellectual Disability (IO/IS)	– Integration Funding Support
– Intellectual Disability/Autism (IO/AU)	– IT – Vision
– Multi Categorical	– IT – Early Intervention
– Physical	– IT – Hearing
– Vision Impaired	– IT – Resource, Early Intervention
– Tutorial	– SSC – Autism
– Early Intervention.	– SSC – Behaviour Disorder
	– SSC – Deaf Blind
	– SSC – Emotional Disturbance
	– SSC – Hearing
	– SSC – Intellectual Disability (ID/ED)
	– SSC – Intellectual Disability (IM)
	– SSC – Intellectual Disability (IO/IS)
	– SSC – Intellectual Disability (IS)
	– SSC – Intellectual Disability/Autism (IO/AU)
	– SSC – Multi Categorical
	– SSC – Physical
	– SSC – Vision

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*.

Outcome Category : All Outcome : No Outcome / Completed Outcome

After the Panel

This is described in [Section 10.3](#).

7.4 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

Bulk Assignment

Clearing House : Please select...

<input type="checkbox"/>	SRN	Student name	AR: Principal Network	School: Principal Network	Priority 1	Priority 2	Priority 3
<input type="checkbox"/>					IT - Hearing CH8		
<input type="checkbox"/>					SCAS - Emotional Disturbance(ED) CH14	OR SCAS - Tutorial Class(TUT) Not Assigned	

- 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.

7.5 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.

7.6 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:

Priority 1	Priority 2	Priority 3	
←○	OR ○	OR ○	○ My unassigned priorities
←○	OR ←○		
○	OR ○		
○→			
○	OR ○	OR ○	○ Priorities assigned to me
○	OR ○		
←○			
←○	OR ←○		
←○			
←○	OR ←○		
○	OR ○	OR ○	← My priorities back from Panel
←○	OR ←○	OR ←○	
←○			
○→	OR ○	○→	→ My priorities assigned to Panels
←○			
←○	OR ○		
←○	OR ○→		
←○	AND ○→		

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:

Assign Priorities to AR Panels

- 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.

7.6.1 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 (**more** than 8 hrs hearing or 12 hrs vision) 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.

AR Panel Priority Outcome

Current

Census School :

Shared Enrolment :

Shared Enrolment Schools :

Enrolment Type (Census) :

Sub Enrolment Type/Support Class :

APH/APV Support Document Signer :

Proposed

When provision is required :

*Intended Start Date :

Case load per week (Hrs) :

(Mins) :

Supplementary per week (Hrs) :

Total Support Allocation per week (Hrs) : Case Load + Supplementary (Hrs + Mins) must not exceed 12.0 Hrs

(Mins) :

*Monitor : Yes No

General Comment :

0/1500

*Status of Priority :

*Section 1 Completed :

*Section 2 Completed :

*Section 3 Completed :

Priority 1: IT - Vision [Draft]

1 of 1

P1 Vision

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 with a reason that the priority is to be reassigned to the Statewide Panel.

7.7 Clearing House Coordinators (P2, P3) Withdrawn, 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.

It may be that only one priority is withdrawn from consideration of 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*.

- 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.

7.8 Clearing House Coordinators (AR/P1 Owner) Returning the Access Request to school: *Return to School*

If there has been a Return to School Request from the CHC (P2 or P3) or from the Panel convenor, the CHC (AR/P1 Owner) will see the symbol for return to a school in their Clearing House ([Section 4.4.2](#))

- Select the student name (Tick box).

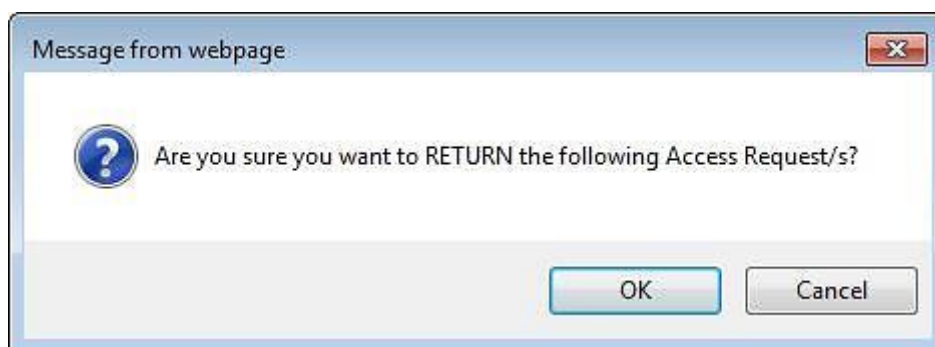
School	Submitted	Priority 1	Priority 2	Priority 3
Cardiff South PS	29/05/2015		OR	

- Under Actions select Return to School.

Return to School

SRII	Student name	AR:Principal Network	School: Educational Services	School: Principal Network	School	Comments
<input type="checkbox"/>	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	Cardiff South PS	<input type="text" value=""/>

- A pop up screen will appear Return to School.
- Add comments
- Press return
- A pop up box will appear asking if you want to return Access Request to School. Press OK.



The Access Request will no longer be in the Clearing House. It will appear in the School's My Access Requests with a validated status. When the Principal has declined the relevant sections, the status of the AR will be validated open. Once the school has updated the Access Request and it has been submitted by the Principal, it will return to the Post Office.

7.9 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 Convenor/s.

7.10 Difference between Withdraw an Access Request and Withdraw a Priority

- There may be a request to withdraw an **Access Request** because the parents/carers do not want any of the provisions in the AR to proceed (Section 4.6.2).

- In another circumstance, the parents/carers may wish to withdraw a priority only (e.g. no longer wish to consider a support class), however the other priority/s in the AR need to be considered.
- DO NOT WITHDRAW PRIORITY 1 as it will make the priorities invisible in access request process. If P1 is the only priority withdraw the access request. If priority 2 or priority 3 are still active then action a return to school for priority 1 rather than withdrawing it.

ACTIONS

To withdraw a priority.

- 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.
- Fill in Comments Section with an explanation.
- Select Save when completed.

Only the priority (not the Access Request) will be withdrawn.

7.11 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.

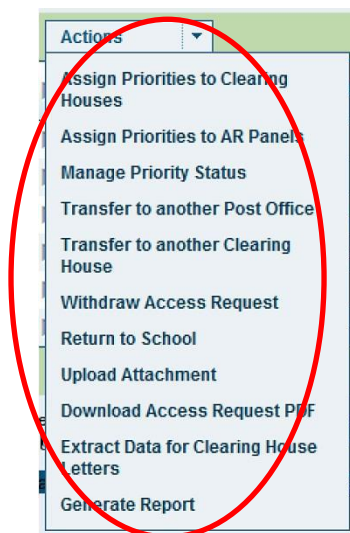
- Select student name/s (tick box).
- Select *Transfer to another Clearing House*
- Again, select the student name/s (tick box).
- Select name of Clearing House.
- Fill in comments section with explanation.
- Select Save when completed.

The screenshot shows a web form titled "Transfer to another Clearing House". The form includes several input fields: "SRN", "Student name", "AR: Principal Network", "School: Principal Network", "Transfer to Clearing House / Principal Network", and "Comments". A dropdown menu is open, displaying a list of clearing houses. The list includes "CH20a - Macarthur", "CH20a - Bankstown", "CH20a - Campbelltown", "CH20a - Canterbury", "CH20a - Fairfield", "CH20a - Georges River", "CH20a - Glenfield", "CH20a - Liverpool", "CH20a - Macarthur", "CH20a - Mamickville", "CH20a - Port Hacking", "CH20a - Port Jackson", "CH20a - Strathfield", "CH20a - Wollondilly", "CH20a - Woronora River", and "CH25a - Macarthur". The "Transfer" button is highlighted in green, and the "Close" button is blue.

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 will need to be *returned to school* to amend before a transfer can occur.

7.12 Common tasks

7.12.1 Under the *Actions* menu



The following tasks are described in the *Common Tasks* chapter:

Action Menu Item
Return to School
<i>Transfer to another Post Office</i>
<i>Withdraw Access Request</i>
Upload Attachment
Download Access Request PDF
Extract Data for Letters
Generate Report
Transfer to another Clearing House

7.12.2 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 8 Access Request Panels

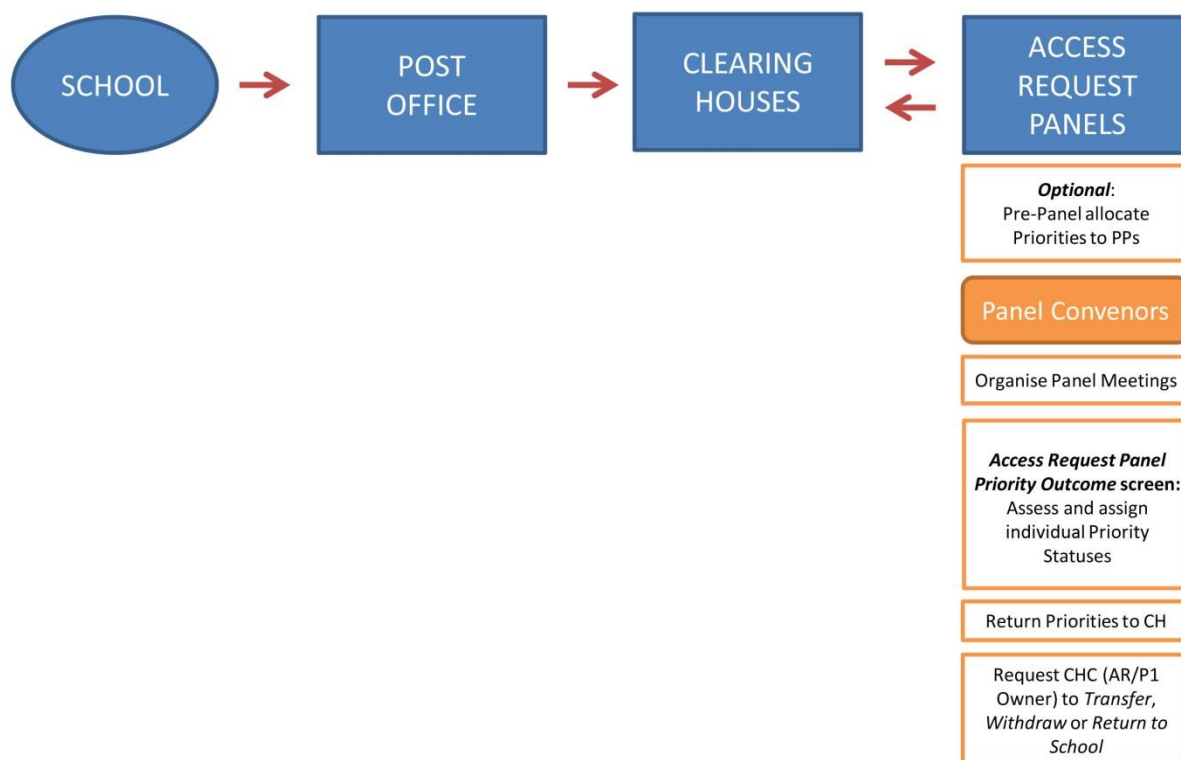


8.1 Workflow

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.



ALLOCATING PRIORITIES TO PANELS:

Priorities can only be allocated to an Access Request Panel before the Panel meeting. The Available End Date, entered when the Panel was first set up (this can be amended) is the date after which no additional priorities can be assigned to that Panel. The meeting date must occur after the Available End Date on which Priorities can be allocated.

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 DoE 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).

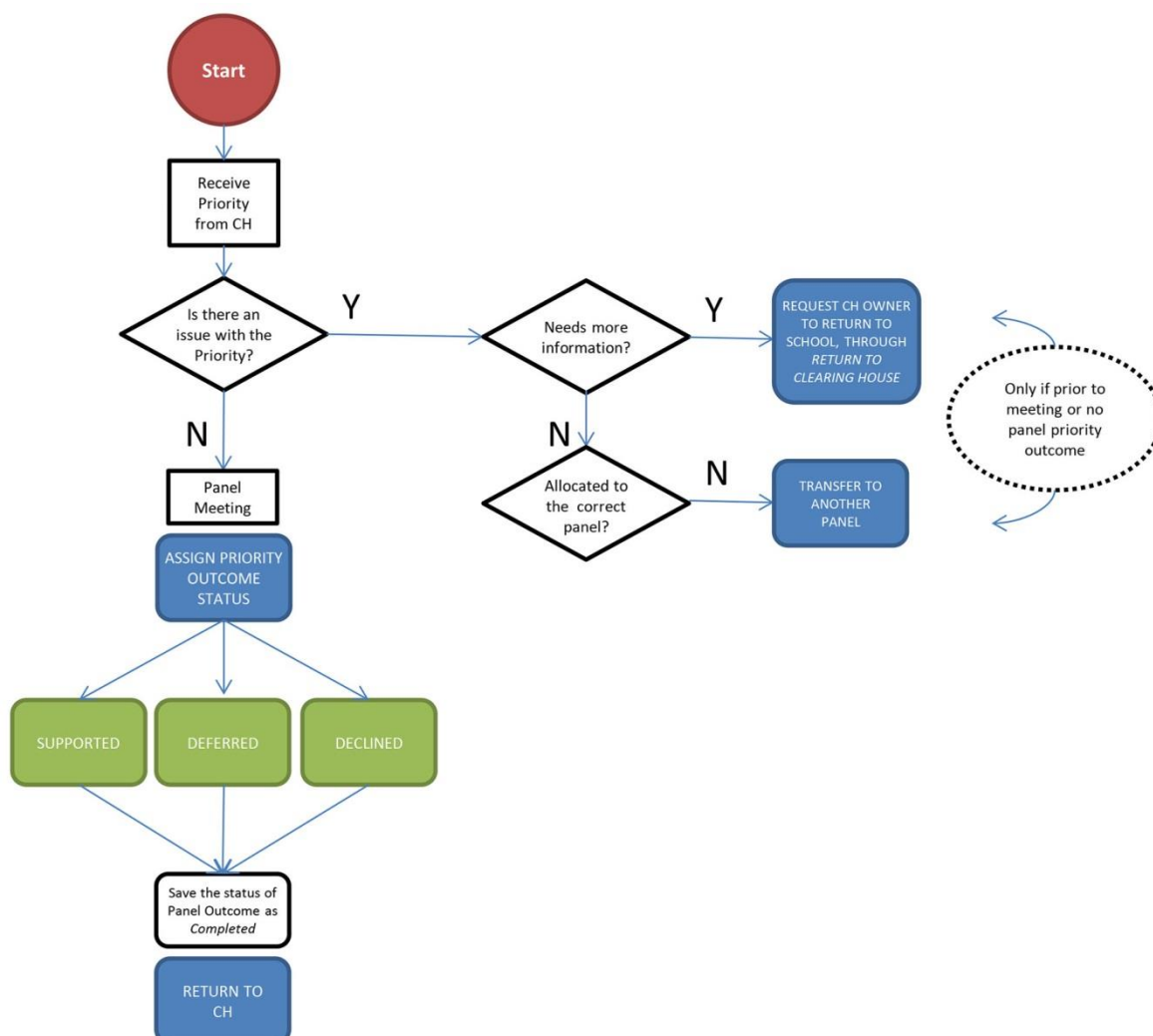
8.1.1 Access Request Panel Administrator

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 5.3](#).

8.1.2 Access Request Panel Convenor Flowchart

The **Access Request Panel Convenor** undertakes most actions under the Panel.

This flowchart details the decision-making process of the Panel Convenor.



8.1.3 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.

8.2 Types of Panels

8.2.1 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.

8.2.2 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 so that Priorities can be considered in an ongoing way.


This panel is optional and follows local processes.

8.2.3 Ongoing 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.

8.2.4 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 local 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.

8.3 Panel Administrator: Creating a Panel under *Administer Access Request Panels* tab

8.3.1 Naming Panels

Panels start with the name of the office, then indicate the purpose of the panel and if a class panel also time information

For example: Nirimba class Wk3T2 2020

8.3.2 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:

- Standard Panel
- Ongoing panel
- 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.

Access Request Panel Administration

Search Criteria

Principal Networks : [Dropdown]

State-wide : All

Panel Name : [Text Box]

Panel Short Name : [Text Box]

Panel Status : All

Start Date : [Date Picker]

End Date : [Date Picker]

Convenor : [Text Box]

Create a AR Panel | Panel Reports | Download

The screen to create a new Panel will then appear.

Create a AR Panel

Principal Networks : [Dropdown]

State-wide : No

Panel Type : Standard

*Panel Name : Standard (0/128)

*Short Name : Pre-panel (0/16)

*Available Start Date : [Date Picker]

*Available End Date : [Date Picker]

Comment : [Text Area]

Status : Draft

*Lead Convenor 1 : [Text Box]

Close | Create

*Indicates mandatory field.

- 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.

Ongoing panel

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.

8.4 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.

8.5 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.

8.6 Adding Access Request Panel Members

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



ADDING 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:

Edit AR Panel Details

Members

Member Type : DEC Staff Non-DEC Staff

*Family Name : 0/100

*First Name : 0/100

*Email Address : 0/132

Work Phone : 0/20

Mobile Phone : 0/20

There are no members attached to this AR Panel

*Indicates mandatory field.



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*.

[View Members](#)

8.6.1 Adding NSW Department of Education Staff as Panel Members

Under *Member Type*, *DoE Staff* appears as the default.

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

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

If the panel member does not appear they have not been provided with a panel member SIM profile or they are missing some of the networks included in the panel from their SIM profile.

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

Field	Mandatory Field	Optional Field
Family Name	x	
First Name	x	
Email Address	x	
Work Phone		x
Mobile Phone		x

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



New Panel Members can be marked to receive email advice.

8.7 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*.



SEARCH:

If you select *Search* without filling in any of the fields, all the Panels to which you have access will appear in the search results list.

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.

8.8 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.



AUTHORITY:

Panel Convenors can only complete the Panels to which they are assigned as the Convenor. Placement Panel Administrators can complete any panel.

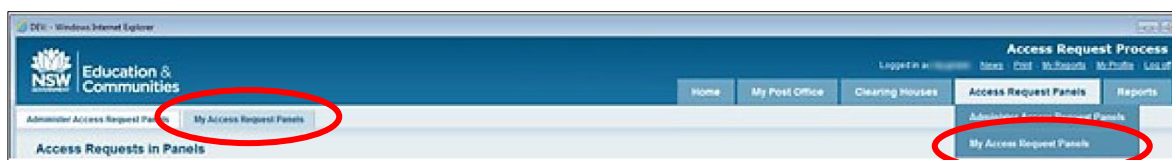
8.9 Locating Priorities/Access Requests in *My Access Request Panels*

8.9.1 Searching

General search instructions are detailed under **Common Tasks** in [Chapter 4](#).

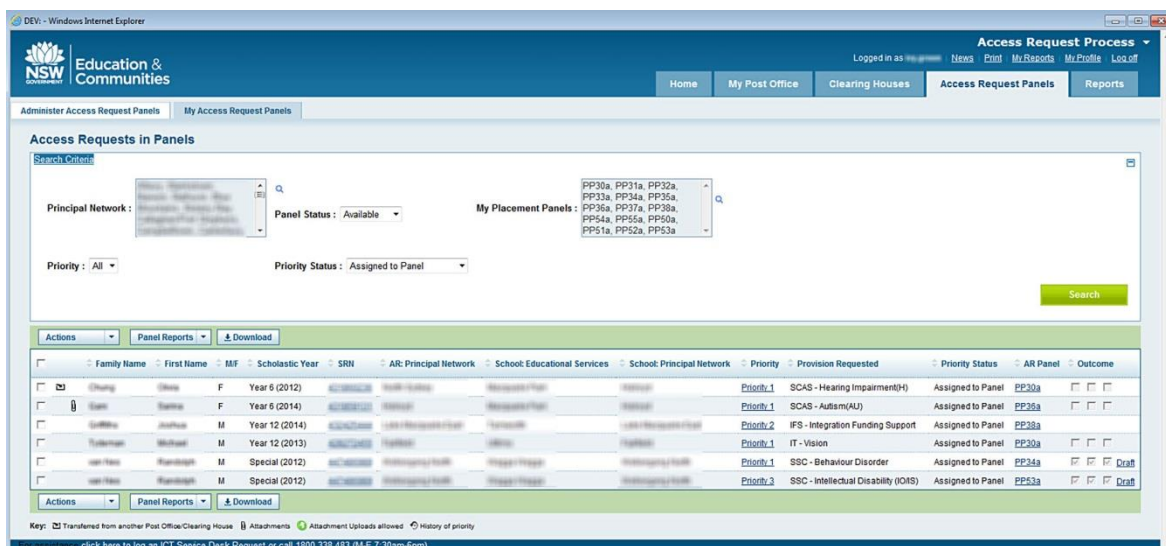
This section applies to Access Request Panel Administrators, Access Request Panel Convenors and Panel Members.

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.

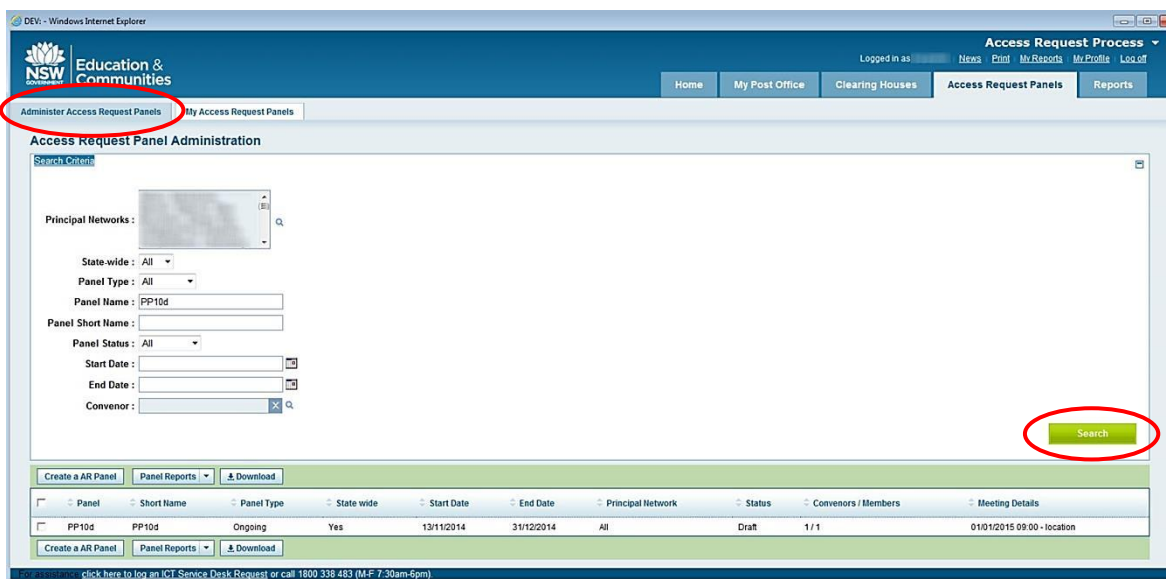


On this page, you can see a summary of the student details for each Access Request Priority, including:


- 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.

8.9.2 Viewing Access Request Panel details

To view detail about the individual Panel, click on the blue tab under the *Access Request Panel*, fill in detail (if known) and select search.



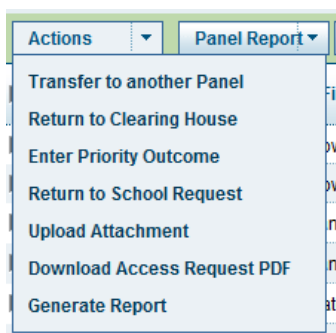
This screen will appear:

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

8.10 Actions menu

8.10.1 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.

8.10.2 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.

8.10.3 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).

8.10.4 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.

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).

8.10.5 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.

AR Panel Priority Outcome

Priority 1: IFS - Integration, Funding Support 1 of 2 P1 Integration, Funding Support

Student Name:

SRN: Verification

Scholastic Year: Year 6 (2013)

Date of Birth: 15/05/2001

Gender: Male

Disability code/s: IN2

Disability Confirmation Expiry Date: 31/12/2013

Home Address:

AR Panel: PP22a

Current

Census School:

Shared Enrolment: No

Shared Enrolment Schools:

Enrolment Type (Census): Mainstream Enrolment

Sub Enrolment Type/Support Class:

Name of New School (if transitioning):

Proposed

When provision is required: Immediate

Current ISTV per week (Hrs):

Current ISTV per week (Mins):

Current ISTH per week (Hrs):

Current ISTH per week (Mins):

Integration Funding Support: [View Profile](#)

*Profile Supported: Yes No

*IFS recommended proceed to State Office: Yes No

General Comment:

*Section 1 Completed:

*Section 2 Completed:

*Section 3 Completed:

*Status of Priority: Please select...

Priority 1: IFS - Integration, Funding Support 1 of 2 P1 Integration, Funding Support

Key: [History of priority](#) Save as Completed Save as Draft Close

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 **Section 1** has been completed, with **Sections 2 and 3** still outstanding. The Priority remains in *Draft* mode.


Priority	Provision Requested	Priority Status	AR Panel	Outcome
Priority 1	IFS - Integration Funding Support	Assigned to Panel	PP22a	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Draft
Priority 1	DE - School/Centre - students with significant support needs	Assigned to Panel	PP22a	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Priority 1	SCAS - Intellectual Disability(IM)	Assigned to Panel	PP22a	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Priority 1	IFS - Integration Funding Support	Assigned to Panel	PP22a	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Draft

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: Example of error list

 • **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*.

8.10.6 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 Section 8.6.1) 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 and only **Close** has been selected.

8.10.7 Assign DESU Priorities to a DESU Statewide Panel

As part of the Clearing House process, the Clearing House Coordinator assesses the Access Request. Where the priority is for DESU, after discussion with the Learning and Wellbeing

Advisor, the Clearing House Coordinator assigns this priority to a Statewide DESU Panel. The Clearing House Coordinator can attach an ES attachment, if required.

8.11 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.

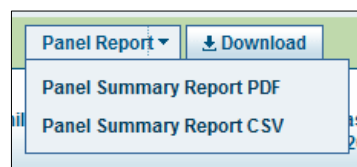
8.11.1 Panel Report: under My Access Request Panels

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 list appears 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.

Access Request Panel Summary									
Panel Name		PP22a (Ongoing)			Comment		test		
Short Name		PP22a			Location		location		
Status					Subject		subject		
Meeting Start Date		01/01/2016 09:00			Convenors		Paul Whitaker		
Meeting End Date		01/01/2016 17:00			Members				
SIN	Family Name	First Name	School	Scholastic Year	Date of Birth	Disability Codes	Home Suburb	Priority	Priority Stat
433502051	Abraham	Michaela	Cardiff High School	Year 12	02/08/1998	IN1, IN1	GLENDALE	Priority 3: IFS (Integration, Funding Support)	Assigned to Panel
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:									
431445018	Bond	Sean	Coogee Public School	Year 8	15/05/2001	IN2	COOGEE	Priority 1: IFS (Integration, Funding Support)	Assigned to Panel
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:									

Panel Summary Report CSV

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

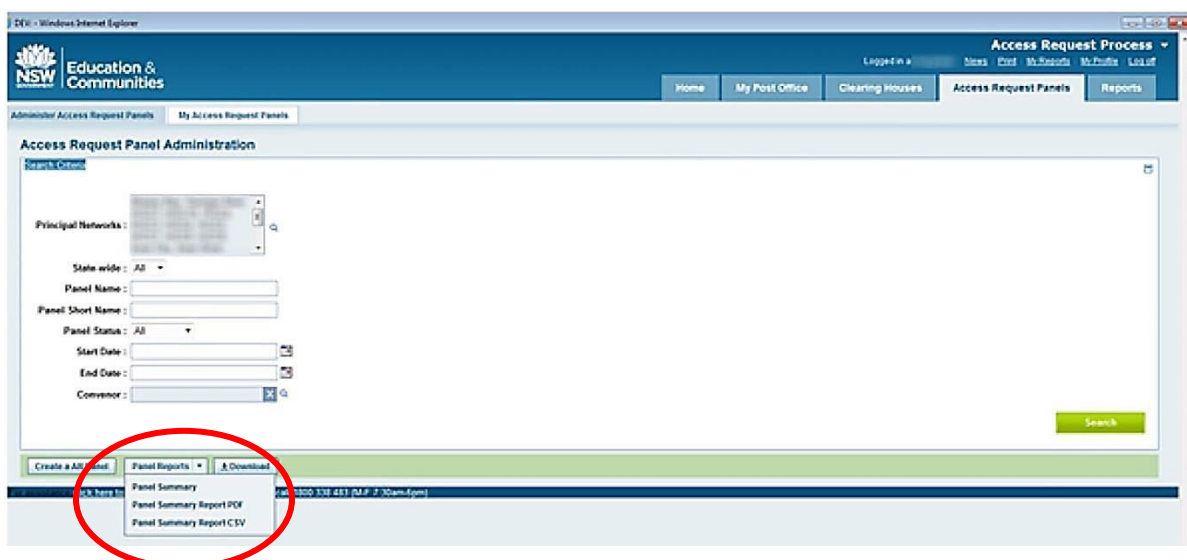
The report will be made available under *My Reports* tab and will also be emailed to you.

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

8.11.2 Panel Report: under Administer Access Request Panels

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

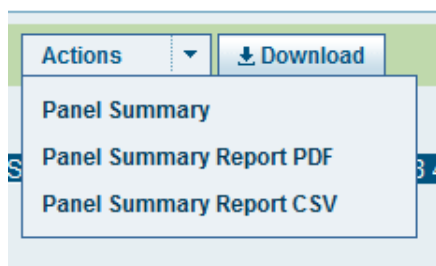
First, you need to search for a Panel (or Panels) on which to base the reports.

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:

AR Panel Summary Report

AR Panel Name: PP24a State-wide: No

Short Name: PP24a Panel Type: Standard

Status: Available

Start Date: 13/10/2014

End Date: 31/12/2014

Comment: test

Meeting Details

Subject: subject

Location: location

Meeting Start Date/Time: 01/01/2015 09:00

Meeting End Date/Time: 01/01/2015 17:00

Convenors:

Members:

Access Requests

SRN	Family Name	First Name	Census School	Scholastic Year	DOB	Disability Code/s	Home Suburb	Priority	Provision Requested	Outcome Status
				Year 6 (2014)	14/07/2002	A1		Priority 1	IFS - Integration, Funding Support	Completed
				Year 12 (2013)	10/04/1995			Priority 3	SCAS - SCAS - Intellectual Disability(IM)	

Print Close

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.

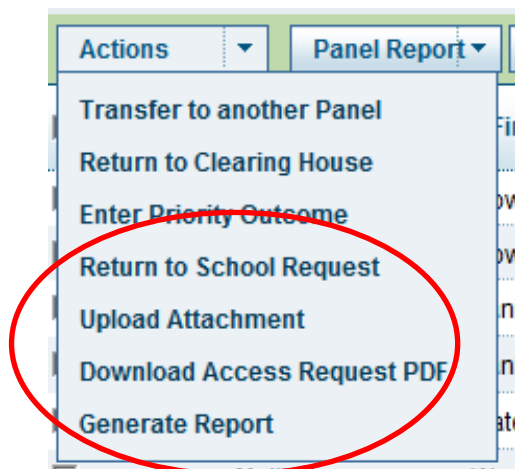
To view the report from *My Reports*, select the tick box and then press *Download*, or download the attachment directly from your email.

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.

8.12 Common tasks

8.12.1 Under the *Actions* Menu



The following tasks are described in the *Common Tasks* chapter:

Action Menu Item	Section
Return to School Request	Section 4.4
Upload Attachment	Section 4.7
Download Access Request PDF	Section 4.9
Generate Report	Section 4.11

8.12.2 Download button

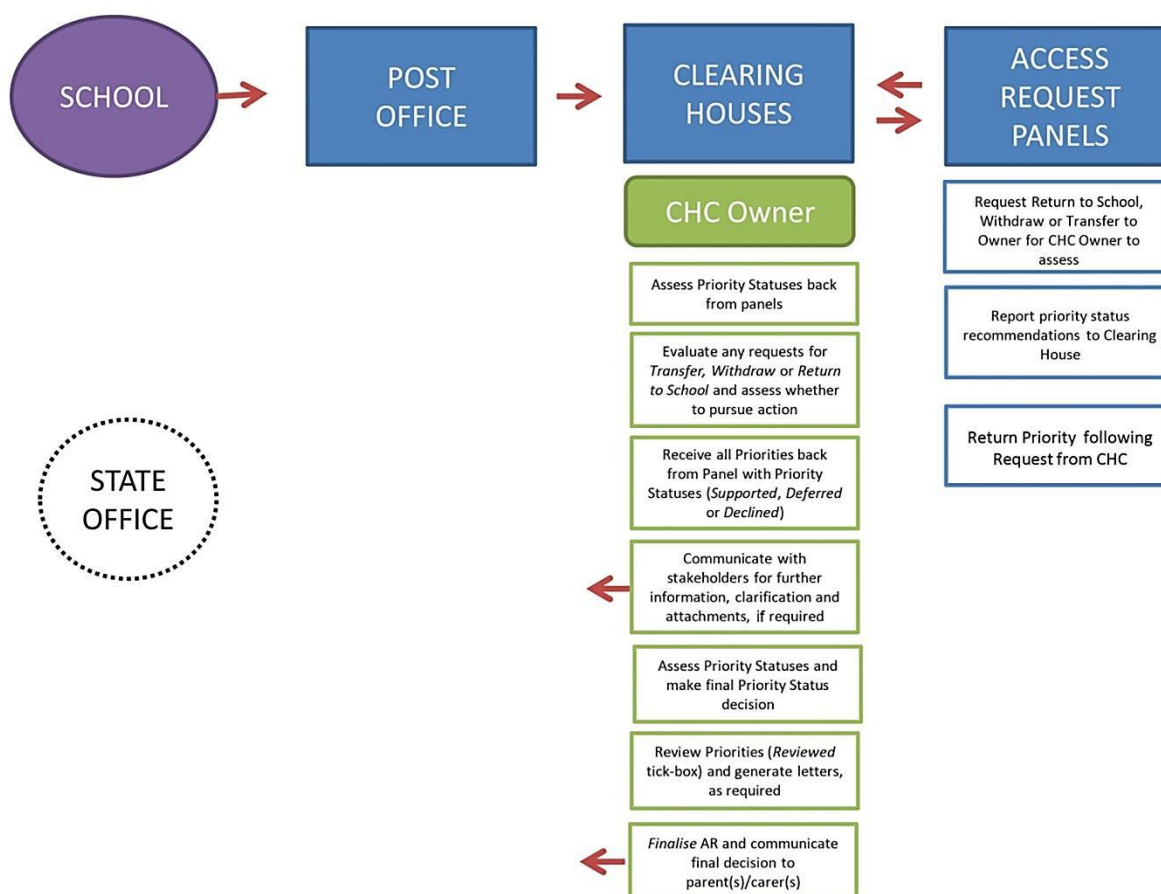
The *Download* button appears in the My Access Request Panels next to the *Actions* drop-down menu. This *Download* button will reproduce the information listed on the screen in an Excel file (see [Section 4.8](#) for more detail).

Chapter 9 Clearing Houses: after the Access Request Panel



9.1 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/carers and State Office, where applicable.

**VIEW ONLY:**

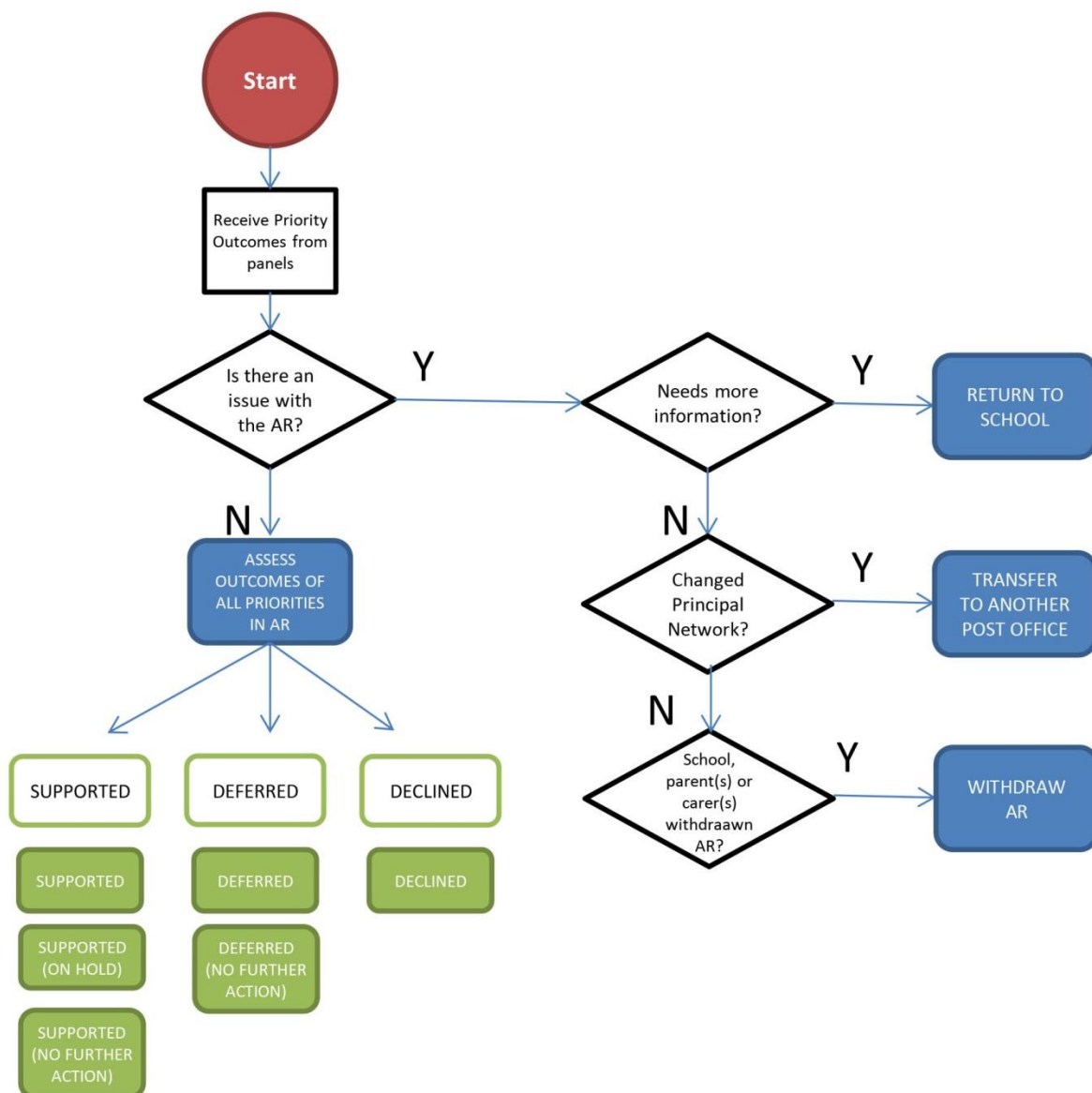
Clearing House Coordinators assigned to P2 and P3 can read and view the Priority Outcome recommendations from the Panel. However, the Clearing House Coordinator (AR/P1 Owner) is the only role that can action them.

9.1.1 Clearing House Administrator

The Clearing House Administrator primarily creates Clearing Houses and takes the actions described in [Section 7.4](#).

9.1.2 Clearing House Coordinator (AR/P1 OWNER) workflow

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

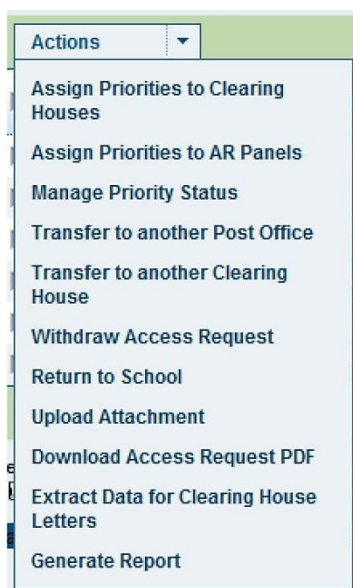


The CHC (AR/P1 Owner) determines the final outcome of the Access Request by considering the Panel Status/es of the Priority/s. The P1 Statuses will be considered first' as they are the first preference for the student.

9.2 Actions

9.2.1 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.



9.3 Using search filters to locate Access Requests in 'My Clearing Houses'

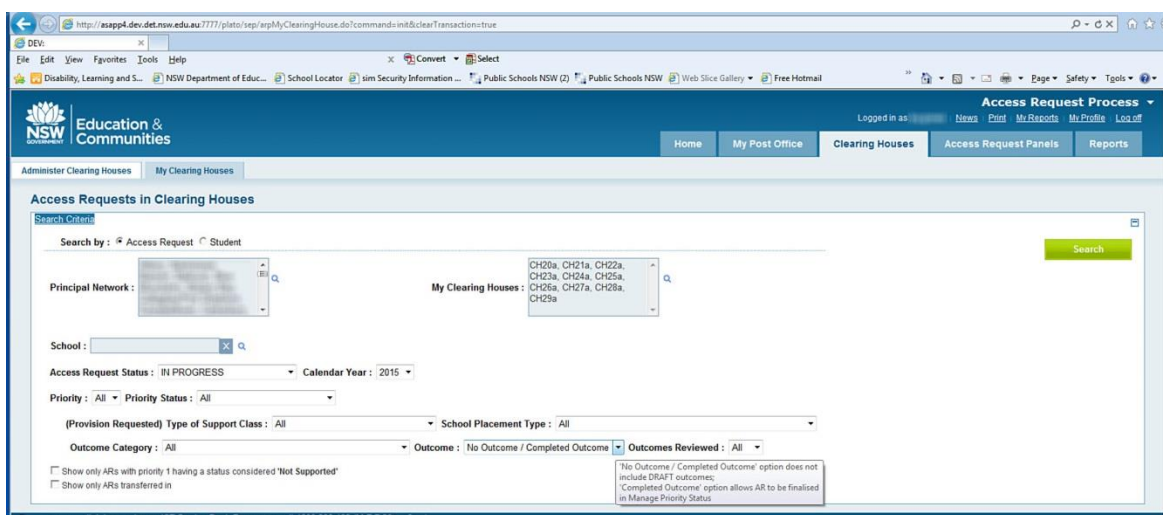
The search filters under the *My Clearing Houses* tab allow the Clearing House Coordinator to locate Access Requests that fit specific criteria.

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

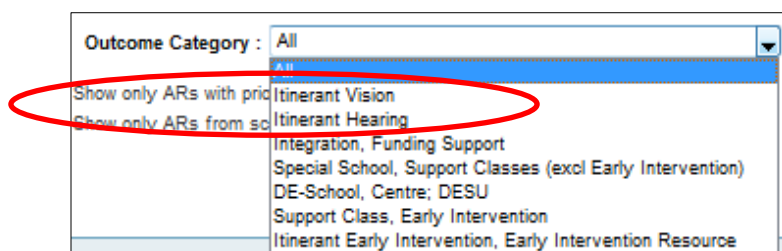
This is described in [Section 8.3](#).

After the Access Request Panel

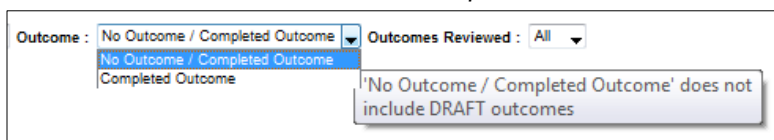


1. Generally, leave the default search option under *(Provision Requested) Type of Support Class* and *School Type* to *All*.

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.

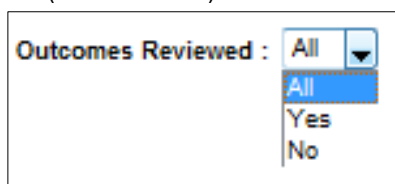


2. Under **Outcome**, there are two options available:



- *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 only be visible to the Panel Convenor.
- *Completed Outcome* captures only those Priorities finalised by the Panel.

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*

9.4 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.

SRN	Student name	School PN	Priority 1	Priority 2	Priority 3
100000001	Matthew Jones	100000	SCAS - Intellectual Disability(IO/AU) Clearing House: [dropdown] Status: Supported Completed Outcome	OR SCAS - Multi Categorical(MC) Clearing House: [dropdown] Status: Declined Completed Outcome	
100000002	Nguyen Smith	100000	SSC - Emotional Disturbance Clearing House: [dropdown] Status: Deferred Completed Outcome	OR SCAS - Emotional Disturbance(ED) Clearing House: [dropdown] Status: Declined Completed Outcome	OR IFS - Integration, Funding Support Clearing House: [dropdown] Status: Supported Completed Outcome
100000003	Rebecca Greenhouse	100000	SCAS - Multi Categorical(MC) Clearing House: [dropdown] Status: Supported Completed Outcome		
100000004	Mark Brown	100000	SCAS - Multi Categorical(MC) Clearing House: [dropdown] Status: Supported Completed Outcome	OR SCAS - Intellectual Disability(IO/IS) Clearing House: [dropdown] Status: Declined Completed Outcome	
100000005	Rebecca White	100000	IT - Hearing Clearing House: [dropdown] Status: Supported Completed Outcome		
100000006	Rebecca Jones	100000	SCAS - Autism(AU) Clearing House: [dropdown] Status: Declined Completed Outcome	OR SCAS - Multi Categorical(MC) Clearing House: [dropdown] Status: Supported Completed Outcome	

- 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](#).

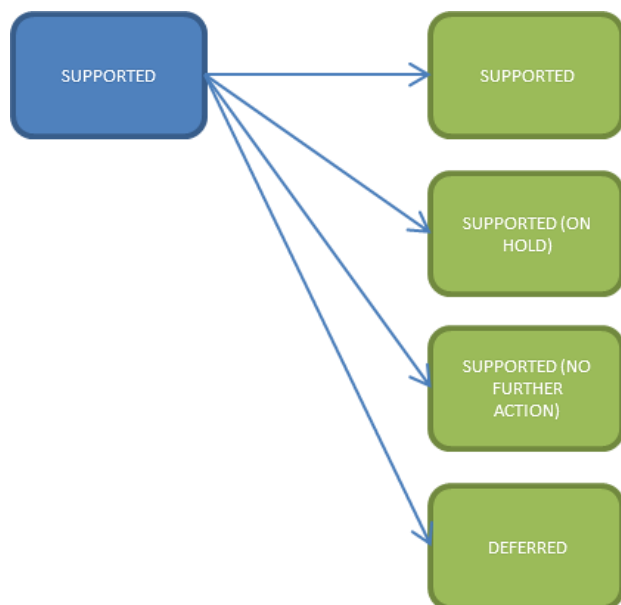
ACTIONS for searching for Priority/s with Completed Outcome

- 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 screen 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:



9.4.1.1.1 PRIORITY 1 (P1):

Status from Panel	Options available to Clearing House Coordinator (AR/P1 Owner)	Final Status Outcome
P1: Supported	P1 is <i>Supported</i> .	To show that the P1 is being accepted, leave the entry as Supported .
	If a P1 is <i>Supported</i> but the stakeholders are dissatisfied with the details (for example, not satisfied with the location), the request can be changed to <i>Deferred</i> and considered again by the Panel at a future date.	To show that the P1 is deferred, select Deferred from the drop-down menu.
	<i>Supported (On Hold)</i> is generally not used for P1. However, there may be a situation in which stakeholders need more time to make a decision. P2 may	To show that the P1 is being placed on hold, select Supported (On

Status from Panel	Options available to Clearing House Coordinator (AR/P1 Owner)	Final Status Outcome
	be considered until a P1 decision is made.	Hold) from the drop-down menu.
	<p><i>Supported (No Further Action)</i> is generally not used for P1. Continuing with the above example, should stakeholders decide against P1, <i>Supported (No Further Action)</i> indicates the Priority was supported, but not taken up.</p> <p>Note: This outcome of ‘Supported (No Further Action)’ cannot be changed – it is final.</p>	To show that the P1 was offered but will not be pursued, select Supported (No Further Action) from the drop-down menu.

9.4.1.1.2 PRIORITY 2 (P2) AND PRIORITY 3 (P3):

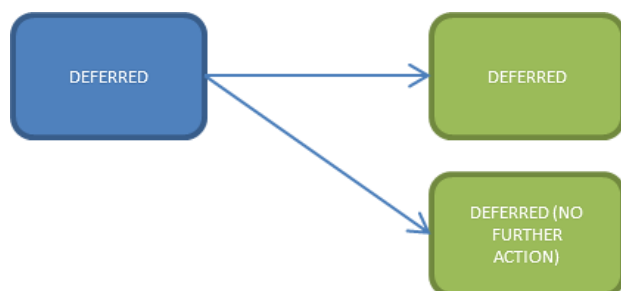
After considering P1, you can then focus on the P2 and P3 Priority Statuses (if applicable).

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

Status from Panel	Options available to Clearing House Coordinator (AR/P1 Owner)	Final Status Outcome
	by the Panel, for example another location, the Priority can be changed to <i>Deferred</i> .	select <i>Deferred</i> from the drop-down menu.

'Deferred' Status

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



9.4.1.1.3 PRIORITY 1 (P1):

Status from Panel	Options available to Clearing House Coordinator (AR/P1 Owner)	Final Status Outcome
P1: Deferred	If a P1 is <i>Deferred</i> , 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.	To show that the P1 is being deferred, leave the entry as <i>Deferred</i> .
	If a P1 is <i>Deferred</i> and the family/carer decides not to wait for another Panel but to accept the outcome of another Priority (P2 or P3). Note: This outcome of 'Deferred (No Further Action)' cannot be changed. It is final.	To show that the P1 is deferred with no further action, select <i>Deferred (No Further Action)</i> from the drop-down menu.

9.4.1.1.4 PRIORITY 2 (P2) AND PRIORITY 3 (P3):

After considering P1, you can then focus on the P2 and P3 Priority Statuses (if applicable).

Status from Panel	Options available to Clearing House Coordinator (AR/P1 Owner)	Final Status Outcome
P2, P3: Deferred	If a P2 or P3 is <i>Deferred</i> , it means that although the student was eligible, the provision was not available. The family/carer may choose to have the request considered by two further panels.	To show that the P2 or P3 is being deferred, leave the entry as Deferred .
	If a P2 or P3 is <i>Deferred</i> , the family/carer may decide not to wait for another Panel. Note: This outcome of Deferred (No Further Action) cannot be changed. It is final.	To show that the P2 or P3 is deferred with no further action, select 'Deferred (No Further Action)' from the drop-down menu.

'Declined' Status

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



9.4.1.1.5 PRIORITY 1 (P1):

Status from Panel	Options available to Clearing House Coordinator (AR/P1 Owner)	Final Status Outcome
P1: Declined	If a P1 is <i>Declined</i> , there are no changes to be made. You will then examine P2 and P3.	Declined (no other options available)

9.4.1.1.6 PRIORITY 2 (P2) AND PRIORITY 3 (P3):

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

9.5 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.

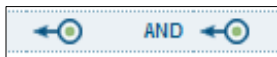
9.5.1 OR Priorities

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



9.5.2 AND Priorities

If an Access Request has more than one Priority with an **AND**, then more than one Priority can be *Supported*. Where there is a supported vision of hearing provisions a drop down box will allow the OR to be changed to AND so that more than one priority can be supported.



My Clearing House — After Panel (continued)

Filter — **Completed Outcome**

Action — **Manage Priority Status**

The **AND** can be changed to **OR** by the P1 owner where one of the priorities is for **sensory support**

Unless there is an 'AND' only one priority can be Supported.

Wait until you are certain the parents will accept the offer of support is in place before changing the status of the AR to Completed. This is the final step and it cannot be reversed

Check the **Reviewed** tick-box to indicate that all priorities have been reviewed and final determinations made for the Access Request

Once the priorities have been considered and finalised, letters are sent to parents/carers and if support class is considered as priority, the clearing house coordinator can initiate the SCAS registration

Manage Priority Status

Access Request Status	Student name	AR Principal Network	School Principal Network	Priority 1	Priority 2	Priority 3	Reviewed	Access Request Status
441941005	Berna, Thovangka	Botany Bay	Botany Bay	SCAS - Intellectual Disability(II) Clearing House: ANIRCLIFFE_BOTANY BAY Status: Supported Completed Outcome: <input type="text" value="Violate Disability confirmation"/>	OR	IPF Integration Funding Report Clearing House: ANIRCLIFFE_BOTANY BAY Status: Supported Completed Outcome: <input type="text" value="No registration required"/>	<input checked="" type="checkbox"/>	<input type="text" value="IN PROGRESS"/>
452292058	Dutton, Braxton	Botany Bay	Botany Bay	SCAS - Intellectual Disability(II) Clearing House: ANIRCLIFFE_BOTANY BAY Status: Supported Completed Outcome: <input type="text" value="Violate Disability confirmation"/>	OR	SCAS - Autism(AU) Clearing House: ANIRCLIFFE_BONDI Status: Deferred Completed Outcome: <input type="text" value="Completed Outcome"/>	<input type="checkbox"/>	<input type="text" value="IN PROGRESS"/>
443172661	Dobrevitz, Ethan	Bondi	Bondi	SCAS - Intellectual Disability(II) Clearing House: ANIRCLIFFE_BONDI Status: Supported Completed Outcome: <input type="text" value="Violate Disability confirmation"/>	OR	SCAS - Autism(AU) Clearing House: ANIRCLIFFE_BONDI Status: Deferred Completed Outcome: <input type="text" value="Completed Outcome"/>	<input type="checkbox"/>	<input type="text" value="IN PROGRESS"/>

9.6 Clearing House Coordinator (AR/P1 Owner): Reviewing and finalising priorities of the AR

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.

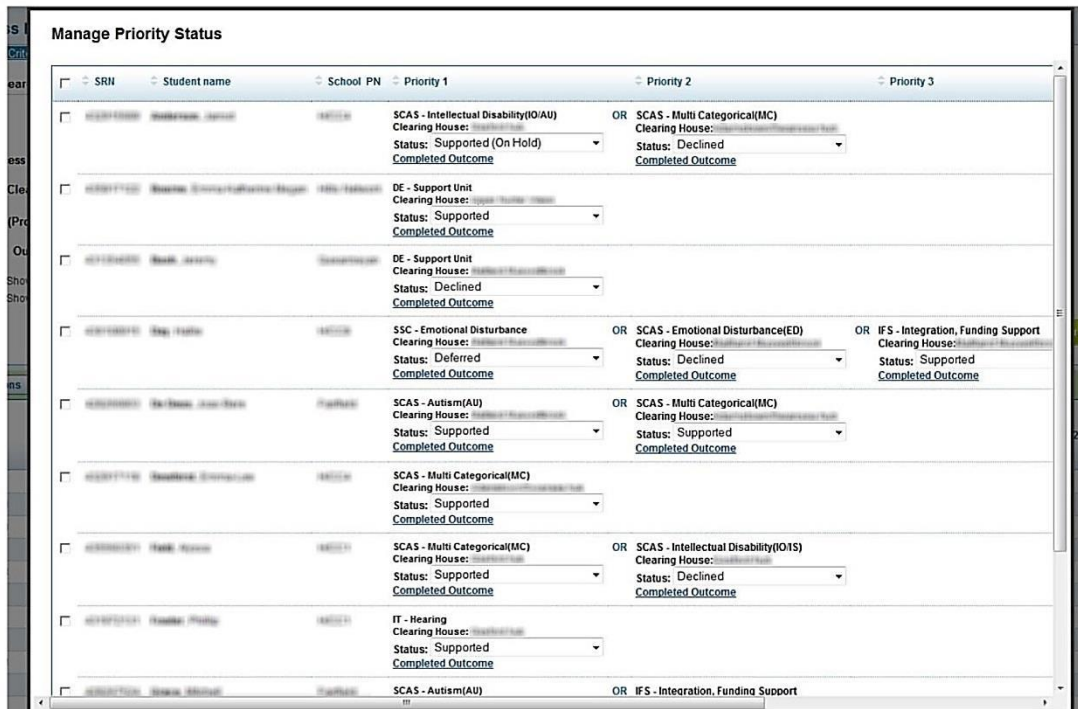
Select *Search*.

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

Select student name (tick box)

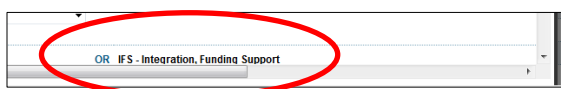
Select *Manage Priority Status* in drop-down menu under *Actions*.

A screen similar to this will appear:

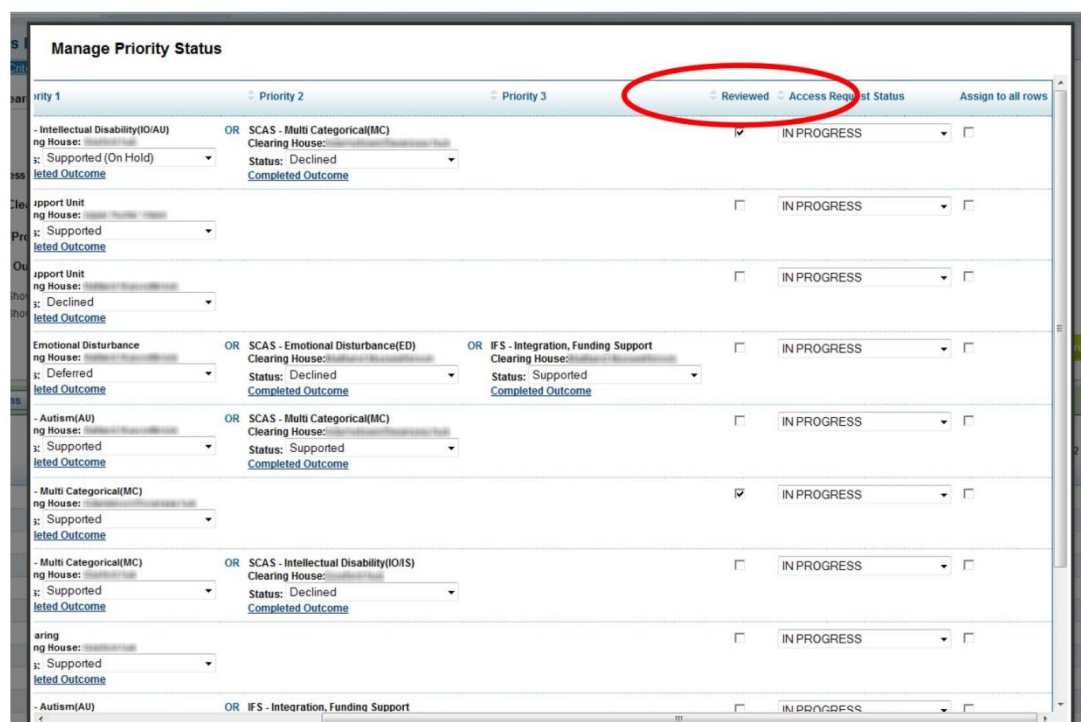


IMPORTANT: Locating the Reviewed tick-box and Access Request Status

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:



9.6.1 Finalising and/or priorities

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.

9.7 Processing Access Request applications where 2 priorities need to be considered at the same time: IFS and support class

There are a number of Access Request applications where 2 priorities need to be considered at the same time: IFS and support class

- Integration Funding Support (IFS) now and a support class for the following year.
- Integration Funding Support now for a student with significant support needs whilst awaiting a panel decision for a support class placement.

An Access Request cannot be completed with 2 supported priorities unless it relates to a sensory priority (and)

In the Clearing House, select the filter *completed outcome* and under Action select: *Manage Priority Status* (Section 10.4).

- If the priority related to support class is supported and IFS is *supported* – change priority related to support class to *supported on hold*, check the reviewed button and run the IFS report which is sent to state office automatically. (Section 11.6.1)
Return to *Manage Priority Status* and change IFS to *supported on hold* and the priority related to support class placement back to *supported*. That priority can now be progressed (parent letter, SCAS registration report).

If you wish to complete the Access Request, change the status of the priority for IFS to *supported no further action*.

You would need to advise state office when IFS is no longer required.

- If the priority related to a support class is *deferred* and IFS is *supported*, check the *reviewed* button and run the IFS report which is sent to state office automatically. Assign the *deferred* priority related to support class to another panel.
- If the priority related to a support class is *assigned to panel* and IFS is *supported* – allow priority related to support class to progress to panel, check the *reviewed* button and run the IFS report which is sent to state office automatically. When the priority related to support class is returned from panel and is *supported*:

Return to *Manage Priority Status*, and change the status of IFS to *supported on hold* and the priority related to support class placement remains as *supported*. You can now progress that priority (parent letter, SCAS registration report).

If you wish to complete the Access Request, change the IFS status to *supported no further action*.

You would need to advise state office when IFS is no longer required.

9.8 Automatic registration into specialist support classes within the Access Request Process application

Access Request Process will allow School Services staff to register students into their specialist support classes from their clearing house after panel. .

After priority outcome decisions by the Placement Panel, the Clearing House Coordinator will, as is currently the process, review the decision. The Clearing House Coordinator will now have the option of selecting the registration button (only after this information is reviewed), which will cause the registration to occur - to a status of Registered Offered (census) or Applied to Enrol Validated where the student is shared with their home school (non census).

<p>Campbelltown SCAS - Autism(AU) OR</p> <p>Clearing House: BAU Testing1</p> <p>Status:</p> <p>Supported ▼</p> <p><u>Completed Outcome</u></p> <p>Census Registration</p>
<p>Holroyd SSC - Behaviour Disorder (BD)</p> <p>Clearing House: BAU Testing1</p> <p>Status:</p> <p>Supported ▼</p> <p><u>Completed Outcome</u></p> <p>Non Census Registration</p>

Step 1: Placement Panel Priority outcome

When a priority for a specialist support class is supported by the Placement Panel the details are entered as usual by School Services team members.

AR Panel Priority Outcome

Priority 1: SCAS - SCAS - Autism(AU) 1 of 4 [1] IVY, One

Student Name : One IVY
 SRN : 457481055
 Scholastic Year : Special (2018)
 Date of Birth : 01/01/2007
 Gender : Female
 Disability code/s : Au, IN2
 Disability Confirmation Expiry Date : 29/01/2021
 Home Address : 28 Bay Street COOGEE 2034
 AR Panel : State Wide PP

Current

Census School : Campbelltown HS
 Non-census/shared enrolment : No
 Non-census/shared enrolment Schools :
 Enrolment Type (Census) : Access Request
 Sub Enrolment Type/Support Class :

Proposed

When provision is required : Immediate
 *Intended Start Date : 27/02/2018
 *Non-census/shared enrolment : Yes No
 *Census School :
 General Comment :
 0/1500
 *Status of Priority : Supported

February, 2018

wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
4					1	2	3
5	4	5	6	7	8	9	10
6	11	12	13	14	15	16	17
7	18	19	20	21	22	23	24
8	25	26	27	28			

Thu, Feb 15

NOTE: When entering the AR Panel Priority Outcome:

- The intended start date must allow enough time for the receiving school to progress the enrolment.
- The scholastic year level needs to match intended start date.

Proposed

When provision is required : Immediate
 *Intended Start Date : 13/10/2017
 *Non-census/shared enrolment : Yes No
 *Census School :

NOTE: Placement panel outcome: the census or non census enrolment button is based on data entered in the proposed section of the AR Panel Priority Outcome screen. Non census/shared enrolment: YES or NO. It is essential that this information is entered correctly after panel.

The automatic registration is created based on the data that is entered on the AR Panel Priority Outcome screen so it is essential that the information is entered correctly after panel.

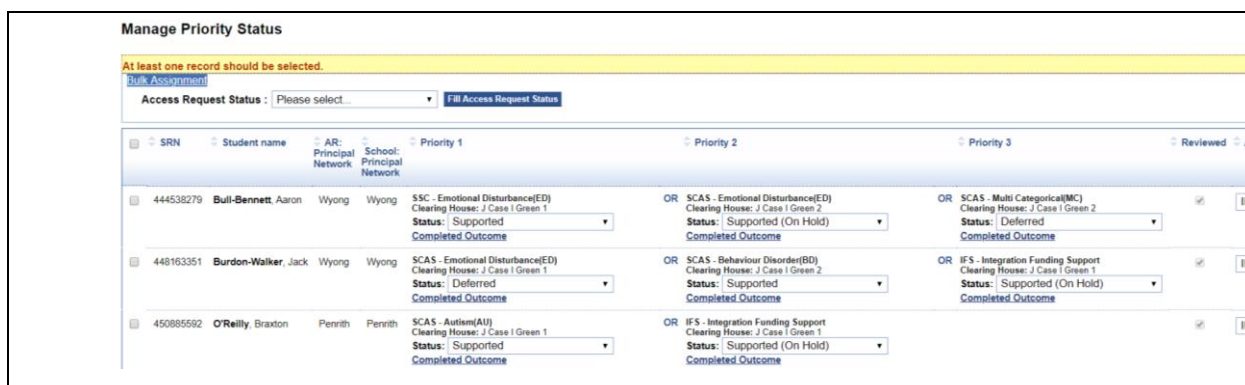
If you find that the AR Panel Priority Outcome has been incorrectly entered and “Saved as Completed” contact Julie.Case@det.nsw.edu.au to request that the priority status is changed back to “Draft” so the information can be re-entered correctly.

Step 2: Outcome decision in the clearing house after panel

After priority outcome decisions by the Placement Panel, the Clearing House Coordinator will, as is currently the process, review the decision. In the Clearing House after panel:

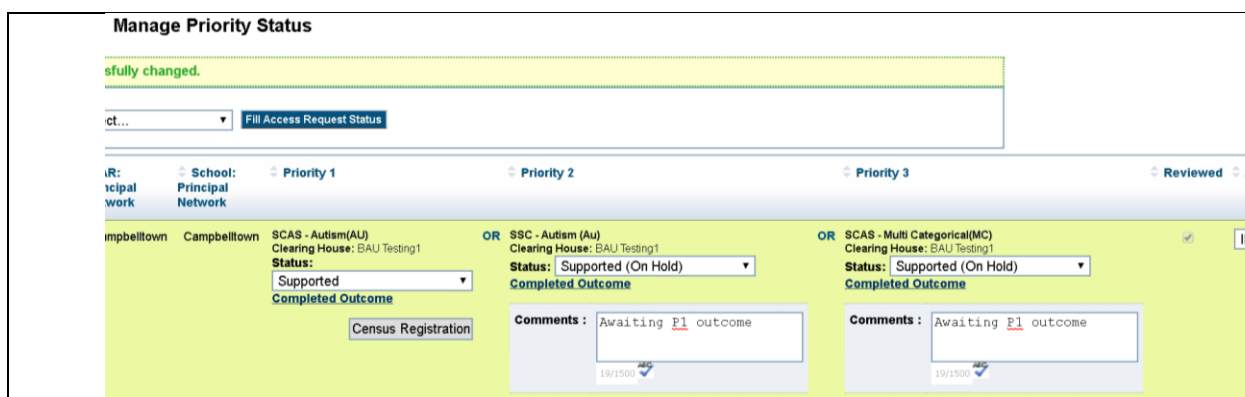
- Filter on Completed Outcome
- Action: Manage Priority Status
- After panel only one priority is “Supported” (unless there is an AND and then 2 priorities can be supported) and if there are other supported priorities they are changed to “Supported on Hold” or “Deferred”.
- One priority is supported, reviewed and saved. The Access Request remains “In Progress”.

3.

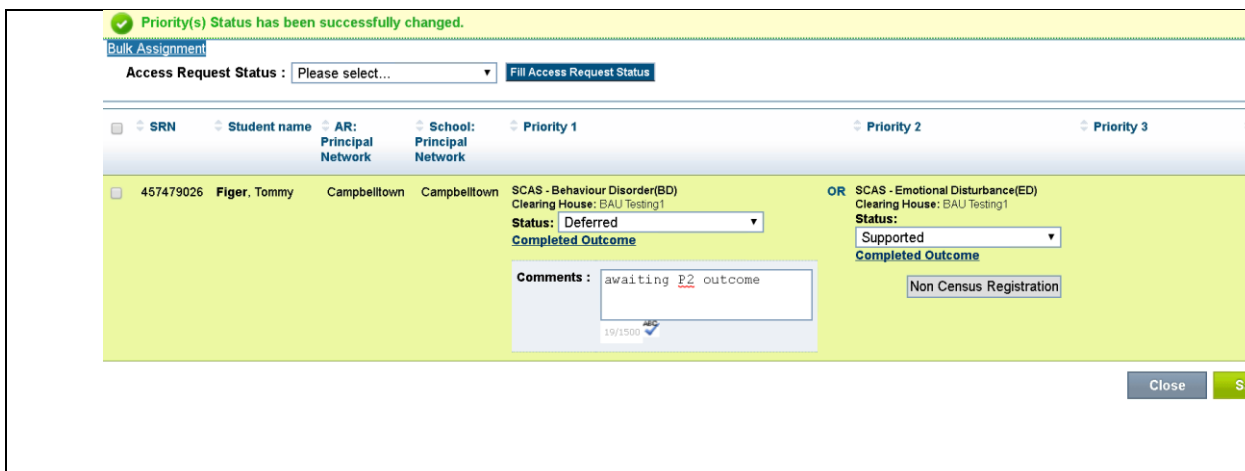
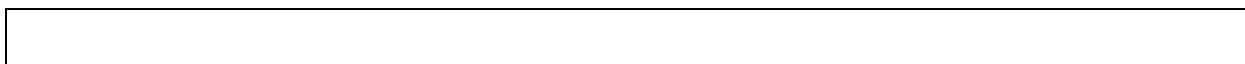


After panel only one priority is Supported ” (unless there is an AND and then 2 priorities can be supported) and if there are other supported priorities they are changed to Supported On Hold or Deferred. One priority is supported, reviewed and then saved.

Step 3: Once the Supported priority is supported, reviewed and saved if the priority is for a support class a registration button will appear.



Once saved if the priority is for a specialist support class a registration button will appear – see the Census Registration button for Priority 1 in this screen shot.



The registration button will appear as Non Census Registration if it is a shared enrolment – see the Non Census Registration button for Priority 2 in this screen shot.

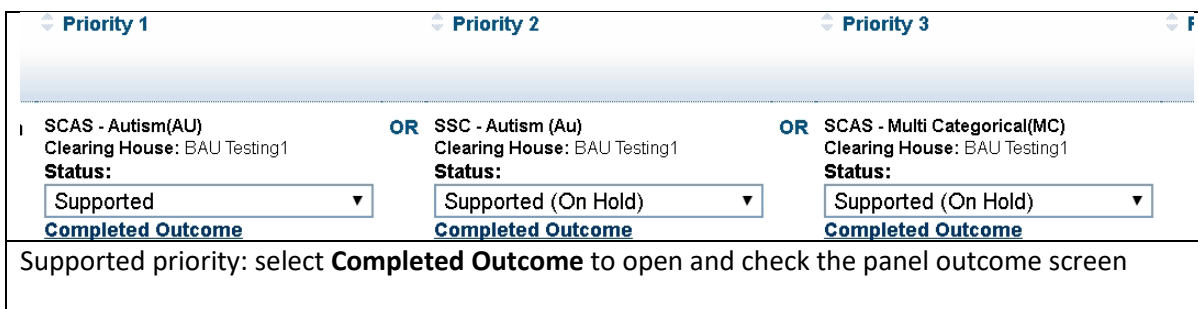
Step 4. Before selecting the registration button check the “Completed Outcome” details

Automatic registrations are owned by the Priority 1 Owner Clearing House Coordinator.

It is essential that:

- the registration details are correct before selecting the registration button.
- communications to parents and schools are coordinated.

First select “Completed Outcome” to open and check that the panel outcome screen is correct before selecting the registration button (see screen shot below).



Step 5: Select the automatic “Census Registration” button

- Select the “Census Registration” button
- Check the registration screen details
- Select “Register This Student At My School”
- An email is automatically sent to the receiving school
- A copy of this email is automatically sent to the Panel Lead Convenor/s
- In the clearing house the registration information will appear under the completed outcome

Step 5: Automatic Census Registration

Step 6: Selecting the automatic “Non Census Registration” button

- Select the “Non Census Registration” button
- Check the registration screen details
- Choose the student’s year level
- Select “Share and Exit”
- An email is automatically sent to the receiving school
- A copy of this email is automatically sent to the Panel Lead Convenor/s
- In the clearing house the registration information will appear under the completed outcome 4.

Step 6: Non census registration – choose the student’s year level. Select Share and exit.

7.

Step 7: After Automatic registration - the registration is recorded in the Access Request Process

After registration the details will appear under the “Completed Outcome” – see priority 1 above.

PriorityHistory			
One IVY (SRN: 457481055) - History of Priority			
Priority 1: SCAS - Autism(AU)			
Date/Time	History Details	Status	Changed By
30/01/2018 10:42	Census- Registered (Offered) at Granville Public School , SCAS - Autism(AU) , Year 3 , 2018	Supported	SAGAR.BAGADE
30/01/2018 10:14	Outcome completed	Supported	SAGAR.BAGADE
30/01/2018 10:02	Assigned to AR Panel (State Wide PP)	Assigned to Panel	SAGAR.BAGADE
30/01/2018 09:54	Assigned to Clearing House (BAU Testing1)	Assigned to Clearing House	SAGAR.BAGADE

Key: History of outcomes

The registration details will also appear in the priority history

Access Request Summary										
SRN	Family Name	First Name	Gender	Date of Birth	Access Request Status	AR Principal Network	School Principal Network	School	Submitted	Raised
457478801	Hoskins	Lara	Female	25/01/2006	IN PROGRESS	Holroyd	Holroyd	Westmead Public School	19/01/2018	Scho
	Priority1 DESU (Support Unit)			Priority 2 SCAS (SCAS - Intellectual Disability(IS))			Priority3			
Clearing House	BAU Testing1									
Access Request Panel	State Wide PP									
Priority Status	Deferred			To Be Assigned						
Priority Panel Outcome Status	Completed									
	Date	History Details	Priority Status							
	19/01/2018	Assigned to Clearing House (BAU Testing1)	Assigned to Clearing House							
	19/01/2018	Assigned to AR Panel (State Wide PP)	Assigned to Panel							
	19/01/2018	Outcome completed	Supported							
	19/01/2018	Applied to Enrol (Validated) at Karonga School , SCAS - Intellectual Disability(IO/IS) , Year 3 , 2018	Supported							
	25/01/2018	Priority status changed by user : deferreddd	Deferred							

The registration details will also appear in the Access Request Summary Report.

Step 8: The “Census Registration” or ‘Non Census Registration” button will appear after the priority is supported, reviewed and saved for:

1. Special School specialist support classes
2. Regular school specialist support classes
3. Distance Education Support Unit – DESU

9.9 Changing the status of an Access Request from in progress to Completed or Declined

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.

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](#) and [Appendix 4](#) Processing IFS applications).

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. (See [Appendix 4](#))

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.

9.10 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.

9.10.1 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.

9.10.2 Report: State Office Integration Funding Support (FS)

The process for running this report is detailed in [Section 11.6](#) and [Appendix 4](#).

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. ([Appendix 4](#))

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 11.7](#)).

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.

Generate Report

*Report : State Office Integration FS

*Start Date : *End Date :

Report Name :

Close Save Criteria Create Report

*Indicates mandatory field.

9.10.3 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.

[Section 11.2](#) and [Section 11.6.3](#)

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

9.10.4 Distance Education

Report: Distance Ed School/Centre

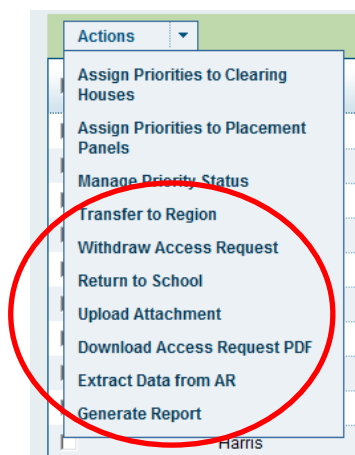
This report lists those Access Requests that are both **Supported** and **Reviewed** and relate to Distance Ed School/Centre. Once the Access Request has been marked as *Completed* it can be attached to an email and processed according to Distance Education Guidelines.

Report: Distance Ed Support

This report lists those Access Requests that have both a supported and received priority for Distance Education Support Unit.

9.11 Common tasks

9.11.1 Under the Actions Menu



9.11.2 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 10 Creating Reports



10.1 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.

10.1.1 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.

Report Function	Available Under
Upload Attachment	Post Office
	Clearing Houses >> <i>My Clearing Houses</i>
	Access Request Panels >> My Access Request Panels
Download Access Request PDF	Post Office
	Clearing Houses >> <i>My Clearing Houses</i>
	Access Request Panels >> My Access Request Panels
Extract Data for Letters	Post Office
	Clearing Houses >> <i>My Clearing Houses</i>
Generate Report	Post Office

Report Function	Available Under
	Clearing Houses >> <i>My Clearing Houses</i>
	Access Request Panels >> My Access Request Panels

10.1.2 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 through *Panel Summary Report CSV*

This is detailed in

10.1.3 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 through *Panel Summary Report CSV*

This is detailed in

10.2 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.

Report	Explanation
State Office Integration FS	One-off for selected date range (inclusive of start and end dates) of Integration Funding Support being the Priority that is <i>Supported</i> and <i>Reviewed</i> . This results in an automatic email sent to State Office, the report saved under <i>My</i>

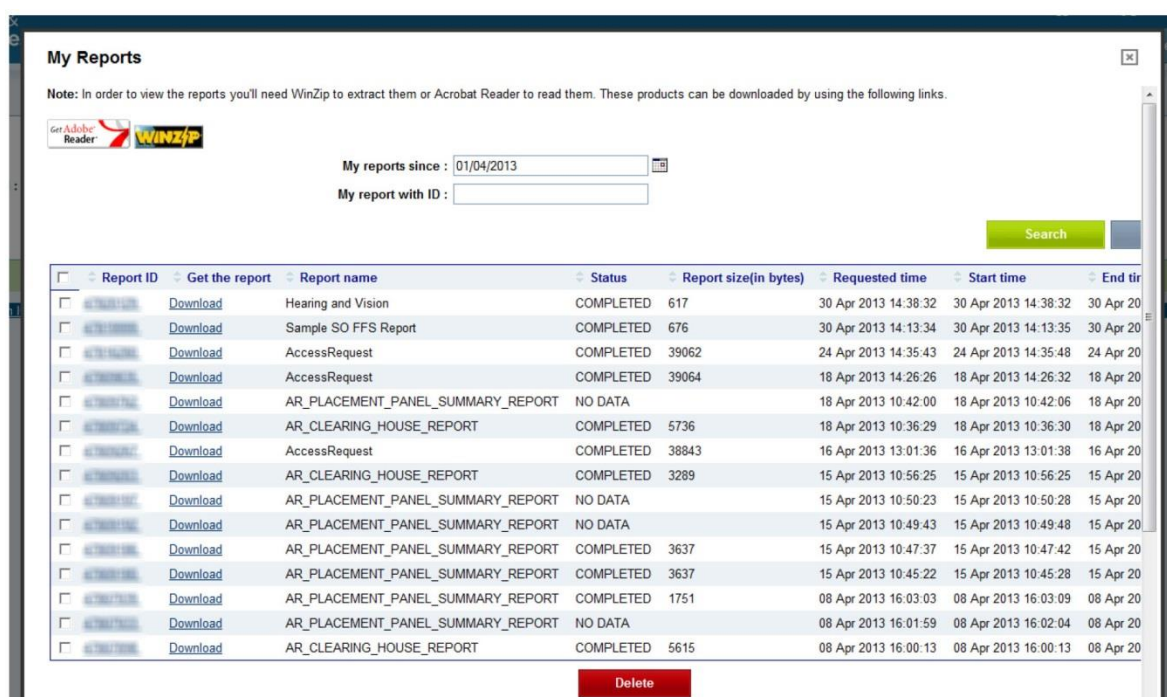
Report	Explanation
	<p>Reports are emailed to the person who generated the report.</p> <p>The email address is: ifsnewapplications@det.nsw.edu.au</p>
Itinerant Hearing Itinerant Vision	Summary of Access Requests with a <i>Supported</i> and <i>Reviewed</i> Priority for <i>Itinerant Hearing</i> and/or <i>Itinerant Vision</i> .
SCAS Registration	Summary of Access Requests with Priorities that have been both <i>Supported</i> and <i>Reviewed</i> in relation to (SCAS) Registration for Support Classes and Special Schools within a date range (inclusive of start and end dates).
Distance Education School/Centre	Summary of Access Requests with Priorities that have been both <i>Supported</i> and <i>Reviewed</i> for Distance Education School/Centre within a date range (inclusive of start and end dates).
Distance Education Support Unit	Summary of Access Requests with Priorities that have been both <i>Supported</i> and <i>Reviewed</i> for Distance Education Support Unit within a date range (inclusive of start and end dates).
Statistical <ul style="list-style-type: none"> • Counts • Detailed 	Tailored reports based on a large number of tick-box and drop-down menu options and parameters that provide area data.
Transfer to ES	<p>Summary of all Access Requests transferred to this ES within a date range (inclusive of start and end dates).</p> <p>Note: Differs from Action: <i>Transfer to another Post Office under the Post Office, Clearing House and Panel</i></p>
Transfer from Educational Services	Summary of all Access Requests transferred from one Educational Services to another Educational Services within a date range (inclusive of start and end dates).
Return to School	Summary of all Access Requests that had a <i>Return to School</i> Status. This will include any

Report	Explanation
	<p>Access Requests that have been returned to school at any time, even though the current Access Request Status could be <i>In Progress</i>, <i>Completed</i> etc.</p> <p>Note: Differs from Action ‘Return to School’ under the Post Office, Clearing House and Access Request Panel</p>
Panel Summary	<p>Summaries of Panel data on screen, as a PDF or as an Excel file.</p> <p>Note: This Report is also under Access Request Panel >> Administer Access Request Panels</p>

10.2.1 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 Report ID or date.



10.3 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.

10.4 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:

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

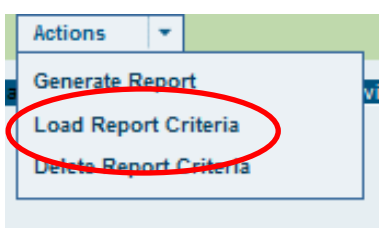
All your *Saved Criteria* reports will appear in the search results list at the bottom of the screen.

Report ID	Report Name	Report Status	Report Owner	Request Time
47527102	IFS Test	SAVED	47527102	2013-05-14
47527104	ARPPS Statistical Report	SAVED	47527104	2013-05-14
47527104	IFS Test2	SAVED	47527104	2013-05-14
47527105	SCAS Intel Dis - MH1	SAVED	47527105	2013-05-14

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

Report ID
<input checked="" type="checkbox"/> 47527102
<input type="checkbox"/> 47527104
<input type="checkbox"/> 47527104
<input type="checkbox"/> 47527105

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.

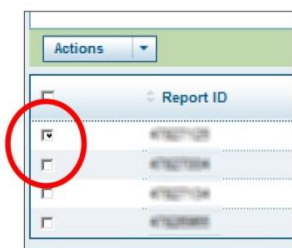
10.5 Delete Report Criteria

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.

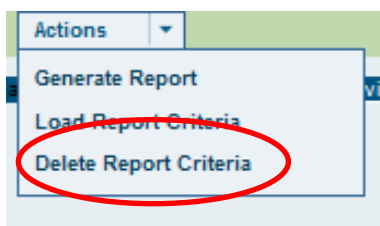
ACTIONS

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

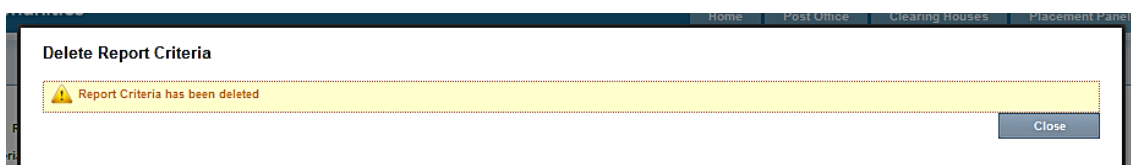
To delete the report criteria, you must first **always** tick the box for the nominated *Saved Criteria*.



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



A confirmation screen will appear.



10.6 Report details

10.6.1 State Office Integration Funding Support

After the CHC (AR/P1 Owner) has finalised the Priority Status by ticking *supported* and the *reviewed* box detailed at Section 10.6 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. ([Appendix 4](#))



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.

Generate Report

Principal Network :

*Report : State Office Integration FS Re Reports on ARs with Priorities that have been Supported and Reviewed

*Start Date :

*End Date :

*My Clearing Houses :

Report Name :

Close Save Criteria Create Report

*Indicates mandatory field.



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.

10.6.2 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.



AND and OR PRIORITIES:

A Priority with an Itinerant Hearing/Vision provision can be **AND** or **OR**.

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.

10.6.3 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).

10.6.4 Distance Education School/Centre

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

10.6.5 Distance Education Support Unit

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

10.6.6 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

- Principal Network
- 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*.

Generate Report

Principal Network :

*Report :

School :

Calendar Year :

Access Request Status :

Clearing House :

State-wide : AR Panel :

Priority : Priority Status :

Outcome Category : Outcome :

Outcomes Reviewed :

Review FROM Date :

Review TO Date :

Type of Support Class : School Placement Type :

Primary Disability Code : Other Disability Code :

Report Name :

10.6.7 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).

10.6.8 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).

10.6.9 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.

10.6.10 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.

10.6.11 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 7 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:

Generate Report

Principal Network :

*Report :

School :

Calendar Year :

Access Request Status :

Clearing House :

State-wide : AR Panel :

Priority : Priority Status :

Outcome Category : Outcome :

Outcomes Reviewed :

Review FROM Date :

Review TO Date :

All
 Parent/Carer Title
 Parent/Carer Family Name
 Parent/Carer First Name
 Parent/Carer Residential Address
 Parent/Carer Residential Suburb
 Parent/Carer Residential Postcode
 Parent/Carer Correspondence Address
 Parent/Carer Correspondence Suburb
 Parent/Carer Correspondence Postcode
 Parent/Carer Day Time Phone Number
 Parent/Carer Mobile Phone Number
 Parent/Carer Email Address
 SRN
 Student Family Name
 Student First Name
 Student Gender
 Student Date of Birth
 Student Scholastic Year
 Referring School Code
 Referring School Name
 Referring School Address

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*.

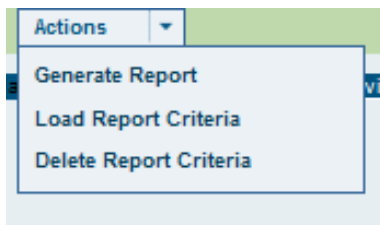
Once you select *Create Report*, the report will be made available under *My Reports* tab and will also be emailed to you.

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

10.7 Working example: Saving and Loading Criteria under *Statistical* Report

10.7.1.1.1 STEP 1: Save Criteria

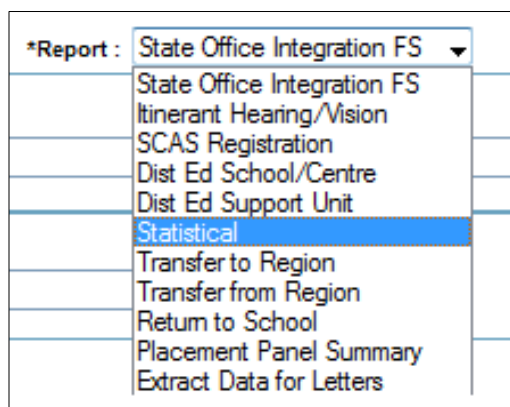
Under the *Reports* tab, select *Generate Report* from the *Actions* drop-down menu.



The following screen will appear:

A screenshot of a web form titled 'Generate Report'. At the top, there is a dropdown menu labeled '*Report : State Office Integration FS'. Below this are two date fields: '*Start Date : [input]' and '*End Date : [input]', both with calendar icons. Underneath is a text input field labeled 'Report Name :'. At the bottom right, there are three buttons: 'Close' (grey), 'Save Criteria' (green), and 'Create Report' (green). A small note at the bottom left states '*Indicates mandatory field.'

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*.

10.7.1.1.2 STEP 2: Load Report Criteria

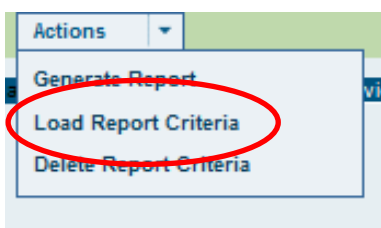
All your *Saved Criteria* reports will appear in the search results list at the bottom of the screen.

Report ID	Report Name	Report Status	Report Owner	Request Time
45527135	IFS Test	SAVED	45527135	20/11/2019 10:30
45527135	A/RPPSStatisticalReport	SAVED	45527135	20/11/2019 10:30
45527135	IFS Test2	SAVED	45527135	20/11/2019 10:30
45527135	SCAS Intel Dis - MH1	SAVED	45527135	20/11/2019 10:30

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 11 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.

HINT	Detail
AND and OR Priorities	An Access Request may have up to three Priorities (P1, P2, P3), which may be separated by an <i>OR</i> or by an <i>AND</i> . An <i>AND</i> is only possible when provisions which include <i>Itinerant Hearing and/or Vision</i> are requested in the Access Request.
Assigning Priorities	An Access Request can have up to three Priorities (referred to in this Guide as P1, P2 or P3). A Clearing House may assign P1 to the Panel and only explore P2 and P3 if P1 is not <i>Supported</i> ; or it may assign all Priorities at once. This is decided by area processes.
Assigning area Administrator Role	It is recommended that multiple people are assigned the Post Office Administrator role. (Chapter 5). 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).
Assigning Roles	An officer from Disability Learning and Support will assign roles as advised.
Bulk Assignment	Bulk Assignment appears in the pop-up screen when selecting one of the options in the <i>Actions</i> drop-down menu list. By selecting multiple students at a time, you can choose <i>Bulk Assignment</i> . This will auto-populate all other rows with the same information you have currently selected.
Checking progress of an Access Request for a school	The school can view the progress of an Access Request and Priorities at any time through <i>My Access Requests</i> .
Clearing House search filters	The various search functions under the <i>My Clearing Houses</i> 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.

HINT	Detail
Clearing House: After Access Request Panel	<p>A Priority that has been returned from a Panel is noted in <i>My Clearing Houses</i> by the arrow pointing to the left, <i>My priorities back from Panel</i>.</p> <p>Section 8.6 explains the final three columns P1, P2 and P3.</p>
Clearing Houses	<i>My Clearing Houses</i> is only visible to the Clearing House Coordinator.
Clearing Houses: After the Access Request Panel	Clearing House Coordinators assigned P2 and P3 can read and view the <i>Priority</i> recommendations from the Panel, but the CHC (AR/P1 Owner) is the only role that can action them from this point.
Clearing Houses: Allocating to Access Request Panels	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.
Clearing Houses: Clearing House Administrator	The Clearing House Administrator is the only role that can search for Clearing Houses under <i>Administer Clearing Houses</i> .
Clearing Houses: Searching under My Clearing Houses	<p>Search results will only appear for Access Requests and Priorities assigned to your Clearing House/s.</p> <p>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.</p> <p>To search across all Access Requests, refer to Section 4.1.1 which details searching in the Post Office.</p>
Criteria: Change Saved Criteria	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.
Criteria: Load Criteria	Note that the prompt about loading criteria is not relevant to the <i>AR Summary</i> Report. This Report is automatically generated and does not allow for tailoring. To tailor a Report, select <i>AR Custom Report</i> .
Deferred: After the Access Request Panel	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.


HINT	Detail
Extract Data for Letters	Data from an Access Request can be extracted into an Excel file for a mail merge in <i>Microsoft Office: Word</i> to create letters. Appendix 6 highlights how to use mail merge in <i>Microsoft Office: Word</i> . The ability to Extract Data for Letters can be done from the Post Office, My Clearing House or the Reports tab.
Finalising the Access Request	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 <i>In Progress</i> to <i>Completed</i> or <i>Declined</i> . This is the last step and the Access Request is now inactive.
History Information 	<p>With different priorities being directed to different Clearing Houses and Panels, an Access Request can be in multiple stages at any given time.</p> <p>The History icon will always show the history of a Priority or an Outcome. The <i>AR Summary</i> Report will summarise an Access Request, including the history of each of the Priorities and Outcomes. To get the <i>AR Summary</i> Report, select a student, select the action <i>Generate Report</i>, and then select <i>AR Summary</i>. Detailed instructions are at Section 4.11.</p>
Home Screen	Information on the <i>Home</i> Screen will change according to the latest system updates and news.
Integration Funding Support Email notification re change in status of Priority	A P2 Integration Funding Support provision is marked as <i>Supported</i> and <i>Reviewed</i> , and P1 is marked as <i>Deferred</i> . The P1 may become <i>Supported</i> and P2 Integration Funding Support provision changes to <i>Supported (On Hold)</i> and then <i>Supported (No Further Action)</i> . 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.
Interim (Emergency) Panel (ongoing)	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.
Multiple Entries	Multiple Access Requests can be assigned to the same Clearing House at a time, just select more than one student/Priority (tick boxes).


HINT	Detail
One Access Request per Student	A student can only have <u>one</u> active Access Request at any given time.
P1 Focus	The main focus of the Access Request is on P1. P1 will <u>always</u> be addressed by the CHC (AR/P1 Owner) after it has been returned from the Panel.
Access Request Panel: Allocating Priorities	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.
Access Request Panel authority	Panel Convenors can only edit the Placement Panels they are assigned to as the Convenor. A Panel Administrator can edit all Panels.
Access Request Panel Members	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.
Access Request Panel Priority Outcome Checkbox	The <i>Access Request Panel Priority Outcome</i> cannot be <i>Saved as Completed</i> until all three checkboxes are ticked to ensure all sections have been assessed. Select <i>Save as Draft</i> when you need to save your work, but have not yet completed assessing the Priority.
Access Request Panel Priority Outcome Screen	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. The Access Request Panel Convenor can <i>Save as Draft</i> rather than <i>Save as Completed</i> if they have not completed work on the <i>Panel Priority Outcome</i> screen.

HINT	Detail
	While Panel Priority Outcomes are saved as <i>Draft</i> , 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 <i>Completed</i> .
Access Request Panel: Summary Report	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.
Access Request Panel: Return to Clearing House Scenario	<p>P1 may have been considered by the Panel before P2 and P3, depending on the meeting dates.</p> <p>If P1 is <i>Supported</i> 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 <i>Return to Clearing House</i> and not proceed to the Panel.</p> <p>P2 and P3 can only be returned to the Clearing House prior to the Panel meeting or when the Priority Outcome has a <i>Draft</i> status. (See also Return to Clearing House Section 8.9)</p>
Access Request Panel: View Members	<p>You can only manage Members if you are the Panel Administrator or Panel Convenor. Otherwise, <i>View Members</i> will appear instead of <i>Manage Members</i>.</p> 
Access Request Panel: Viewing Multiple Panels	If you have selected multiple Panels to view in the <i>Panel Summary</i> , you can scroll to each Panel summary at the top right-hand side of the pop-up screen:
Access Request Panels: Completing	You cannot change the status of a Panel to <i>Completed</i> if there are still active Priorities assigned to it.
Access Request Panels: Interim (Emergency) Panels (ongoing)	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.
Pre-Panel Meeting	The role of a Pre-Panel Meeting is to assess all Priorities and assign Priorities to specific Panels. They do not have access to complete Panel Priority Outcomes.

HINT	Detail
	It is a local decision whether to hold a Pre-Panel Meeting or whether the Clearing House Coordinators assign Priorities directly to the Panels.
Access Request Panels: Searching in My Access Request Panels	Search results will only appear for Access Requests and Priorities assigned to your Access Request Panel. To search across all Access Requests, refer to Section 4.1.1 , which details searching in the Post Office.
Access Request Panels: Viewing Priorities not Assigned to You	You can view Priorities not assigned to you but you cannot Action them. Should you try, by selecting the Action from the drop-down menu, the tick-box will not be available to allow any edits or Actions.
Post Office: Viewing All Available Entries	To view all results under the Post Office just press <i>Search</i> without pre-selecting any fields. Note that the default drop-down Access Request Status is <i>Submitted</i> . These refer to all Access Requests under the Post Office. You can change this by selecting <i>All</i> or another Status from the <i>Access Request</i> drop-down menu.
Priorities	An Access Request can have up to three Priorities – P1, P2, P3. There will <u>always</u> be one Priority (P1).
Priorities: Assigning P2, P3	CHC (AR/P1 Owner) may assign P2, P3 to the suitable Clearing House, their own or another. Priorities in search lists that have not been allocated to a Panel will <u>not</u> have an arrow (left or right facing) on their dot under the Priority screen summary in the far right columns.
Post Office Administrator Actions	Post Office Administrators can only action <i>Withdraw</i> , <i>Transfer</i> or <i>Upload an Attachment</i> request if the Access Request has not yet been assigned to a Clearing House, that is the Access Request status is <i>Submitted</i> , not <i>In Progress</i> . If it has been assigned to the Clearing House, it is up to the CHC (AR/P1 Owner) to action. As a Post Office Administrator, any results that appear on the Post office search results page that are not <i>Submitted</i> will be <u>read-only</u> .
Report names	Be specific when you are naming reports so they are easy to find in the future.

HINT	Detail
Reports: Load Criteria	If you have previously Saved Criteria, follow the steps detailed in Section 11.3 about loading saved criteria for Reports.
Return to Clearing House	Any Clearing House Coordinator can request that their Priority/s be <i>Returned to the Clearing House from the Panel</i> . 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
Return to School	<p>The Return to School option can be taken as an action or as a request:</p> <ul style="list-style-type: none"> • Post Office Administrator action as <i>Withdrawn</i> • Action: CHC (AR/P1 Owner) under the Clearing House • Request: Clearing House Coordinator (P2, P3) in My Clearing House through <i>Manage Priority Status</i> • Request: Panel Convenor in My Access Request Panel through <i>Return to School Request</i> <p>The CHC (AR/P1 Owner) will assess whether to pursue the <i>Return to School Action</i> or whether the Access Request should proceed given the higher order Priorities.</p> <p>When an Access Request is resubmitted by a school after a <i>Return to School Action</i>, it will be actioned through the Post Office. It does not go directly back to the Clearing House.</p>
Return to School from Panel	<p>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.</p> <p>However, it is possible:</p> <ul style="list-style-type: none"> • Assign the Priority to the Interim (Emergency) Panel (ongoing) for a decision • Assign the Priority to another available Panel.
Screen Appearance	Privileges are associated with each role. They determine what the user can and cannot see and do in the program.
Searching by Student	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 an Access Request for a specific student.

HINT	Detail
Searching hints	Sections 4.1 , 8.3 and 10.3 . offer details and hints about using the search functions under the <i>My Clearing Houses</i> tab.
Start and End Dates	Start and End Dates throughout the program are <u>inclusive</u> .
State Office IFS Report	This Report will only pick up on Access Requests which have the <i>Reviewed</i> box tick and have a <i>Supported</i> Priority Status. Overlapping dates when running the State Office IFS Report function is preferable to omitting dates.
State Office: More Information	Should State Office require more information from an Access Request, the CHC (AR/P1 Owner) will Action as <i>Return to School</i> . (Section 4.4).
Submitted Not Assigned	In the Post Office, Access Requests with a <i>Submitted</i> Access Request Status will also have a <i>Not Assigned</i> Status of Priority under the <i>Clearing House</i> column.
Transfer to Another Post Office	<ol style="list-style-type: none"> The <i>Transfer to another Post Office</i> option can be taken as an action or as a request: <ul style="list-style-type: none"> Action: Post Office Administrator under the Post Office Action: CHC (AR/P1 Owner) under the Clearing House Request: Panel Convenor under the My Access Request Panels through <i>Return to Clearing House</i> Email from Clearing House Coordinator (P2, P3) to CHC (AR/P1 Owner) requesting transfer of Access Request. You can only transfer a student to another Post Office if you are the CHC (AR/P1 Owner) of that Access Request. <p>When the Access Request is actioned as <i>Transfer to another Post Office</i>, the Access Request will always be delivered to the new Post Office.</p>
Upload attachment: School 	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 a previous attachment.
Upload attachments: Educational Services Attachments	Learning and Wellbeing attachments can only be viewed by Learning and Wellbeing staff. If an Access Request is withdrawn or returned to school, the attachment/s is automatically removed.

HINT	Detail
Viewing Access Requests from Other areas	In the search criteria, you can tick the box <i>Show only ARs transferred in</i> if searching for one that may have been transferred in 
Viewing All Available Results	<p>To view all available search results, you can just press <i>Search</i> without filling in any of the drop-down menu fields.</p> <p>Under the Post Office, the <i>Submitted</i> Access Request Status is the default; this refers to <i>Access Requests</i> in the Post Office. You can change this by selecting <i>All</i> or another Status from the <i>Access Request</i> drop-down menu.</p>
Viewing Principal Network	Only the Principal Networks in which the user works or has access to, will automatically appear.
Withdraw Access Request	<p>1. An Access Request will generally only be withdrawn at the request of the school, parent(s) or carer(s). The <i>Withdraw an Access Request</i> option can be taken as an action or as a request:</p> <ul style="list-style-type: none"> • 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 <i>Manage Priority Status</i> • Request: Panel Convenor under the My Access Request Panel through <i>Return to Clearing House</i> <p>To <i>Withdraw an Access Request</i> will remove it from consideration. You will need to be <u>sure</u> before withdrawing the Access Request.</p> <p>2. When the Access Request is actioned as <i>Withdraw</i>, it is returned to the school's <i>My Access Requests</i> with a Status of <i>Withdrawn by Principal Network (Inactive)</i>.</p> <p>The Access Request will no longer be part of the <i>Panel Process</i>. The school can reactivate the Access Request within 12 month of its creation date. It can then be submitted to the Post Office.</p>

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 an Access Request Panel

1.1. All Access Request Statuses – AR1 and AR2

Status	Definition
Draft	<ul style="list-style-type: none"> • Initial status of an Access Request
Open	<ul style="list-style-type: none"> • When the provision request has been completed
Validated	<ul style="list-style-type: none"> • All sections (before the School Principal sign off) have been signed/completed by the participants
Submitted	<ul style="list-style-type: none"> • An Access Request was submitted to the <i>Post Office</i>
Validated open	<ul style="list-style-type: none"> • Had reached validated status and Principal declined specific sections
Withdrawn (By Principal Network)	<ul style="list-style-type: none"> • An Access Request was withdrawn by the Post Office or Clearing House Coordinator
Withdrawn (Automatically)	<ul style="list-style-type: none"> • An Access Request which was not submitted was withdrawn by the system (when it is more than 12 months from creation date)
Withdrawn (By Parent)	<ul style="list-style-type: none"> • An Access Request was withdrawn by the parent
Withdrawn (By School)	<ul style="list-style-type: none"> • An Access Request was withdrawn by the school
In Progress	<ul style="list-style-type: none"> • An Access Request is being assessed as part of the <i>Access Request Process</i>

Status	Definition
Completed	<ul style="list-style-type: none"> A <i>Completed</i> Access Request, returned from <i>Access Request Process</i>
Declined	<ul style="list-style-type: none"> A <i>Declined</i> Access Request, returned from <i>Access Request Process</i>

1.2. Access Request Statuses as part of the *Access Request Process*

Access Request Status	Definition
Submitted	<ul style="list-style-type: none"> An Access Request was submitted to the <i>Post Office</i>
In Progress	<ul style="list-style-type: none"> Priority 1 of an Access Request has been assigned to a CHC (AR/P1 Owner) by the Post Office Administrator in the <i>Post Office</i> An Access Request remains In Progress in the <i>Clearing House</i> and the <i>Access Request Panel</i> until a final determination of <i>Completed</i> or <i>Declined</i> is received from the Owner
Completed	<ul style="list-style-type: none"> Final determination status actioned by the <i>Clearing House</i> In the school's <i>My Access Requests</i> (inactive)
Declined	<ul style="list-style-type: none"> Final determination status actioned by the <i>Clearing House</i> In the school's <i>My Access Requests</i> (inactive)

1.3. Status of Priority

Status of Priority	Description	Location of Priority	Action drop-down menu item	Responsible Role
To Be Assigned	Priority 1 with CHC (AR/P1 Owner) – other Priorities not yet assigned to CHC	CH		Automatic
Assigned to Clearing House	Priority is assigned to a CH by area Administrator through the PO or	PO to CH	Assign to CH (Post Office Administrator in PO)	Automatic Post Office Administrator

Status of Priority	Description	Location of Priority	Action drop-down menu item	Responsible Role
	CHC (AR/P1 Owner) through the CH		Assign Priorities to CH (CHC (AR/P1 Owner) in My CH)	AR Owner CHC (AR/P1)
Assigned to Panel	Priority is assigned to a Placement Panel	CH to Panel	<i>Assign Priorities to Panel</i> (CHC (AR/P1 Owner) in My CH)	Automatic when a Priority is assigned to a Panel
Withdrawn	Any CHC can identify a Priority to <i>Withdraw</i> Only the CHC (AR/P1 Owner) can action the request Generally requested by parent(s)/carer(s) or school	Panel to CH or CH	Request: <i>Manage Priority Status</i> (CHC (P2, P3) in My CH or PPC in My AR Panel) Action: <i>Return to School</i> (CHC (AR/P1 Owner) in My CH)	CHC (P2, P3) or Panel Convenor CHC (AR/P1 Owner)
Return to School	Any CHC or Panel Convenor can initiate a <i>Return to School request</i> – more detail required. 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 <i>Draft</i>	Panel to CH or CH	Request: <i>Manage Priority Status</i> (CHC (P2, P3) in My CH or PPC in My AR Panel) Action: <i>Return to School</i> (CHC (AR/P1 Owner) in My CH)	CHC (P2, P3) Panel Convenor CHC (AR/P1 Owner)
Deferred	The Access Request Panel <i>Deferred</i> the Priority	Panel to CH	<ul style="list-style-type: none"> <i>Access Request Panel Priority</i> 	Panel Convenor

Status of Priority	Description	Location of Priority	Action drop-down menu item	Responsible Role
	<p>and it is waiting to be reassigned to a further Panel if there is no outcome to a higher order Priority.</p> <p>When the Priority Status is changed from Supported to Deferred if stakeholders are not satisfied with <i>Supported</i> Priority, e.g. location</p>		<p><i>Outcome</i> (Panel Convenor in My Access Request Panel)</p> <ul style="list-style-type: none"> • <i>Manage Priority Status</i> (CHC) in My CH) 	<p>CHC</p> <p>CHC</p>
Supported	The Panel <i>Supported</i> the Priority	Panel to CH	<p><i>Panel Priority Outcome</i> (PP Convenor in My PP)</p> <p><i>Manage Priority Status</i> (CHC (AR/P1 Owner) in My CH)</p>	<p>Panel Convenor</p> <p>CHC</p>
Declined	The Panel <i>Declined</i> the Priority	Panel to CH	<p><i>Panel Priority Outcome</i> (Convenor in My Access Request Panel)</p> <p><i>Manage Priority Status</i> (CHC (AR/P1 Owner) in My CH)</p>	<p>Panel Convenor</p> <p>CHC</p>
Supported (On Hold)	The Priority is <i>Supported</i> by the Panel. It is waiting for decision of a higher order Priority which is also	CH	<i>Manage Priority Status</i> (CHC in My CH)	<p>CHC (P2, P3)</p> <p>CHC (AR/P1 Owner)</p>

Status of Priority	Description	Location of Priority	Action drop-down menu item	Responsible Role
	<i>Supported by the Panel.</i>			
Supported (No Further Action)	The Priority was previously <i>Supported</i> or <i>Supported (On Hold)</i> <i>Supported (No Further Action)</i> . This cannot be undone	CH	<i>Manage Priority Status</i> (CHC (AR/P1 Owner) in My CH)	CHC (AR/P1 Owner)
Deferred (No Further Action)	The AR is <i>Completed</i> and the Priority previously was <i>Deferred</i>	CH	<i>Manage Priority Status</i> (CHC (AR/P1 Owner) in My CH)	CHC (AR/P1 Owner)
Return to Clearing House	Any CHC can request a Priority to <i>Return to Clearing House from Panel</i> Only the CHC (AR/P1 Owner) can action the request Can only happen from Panel, before it meets or if Priority outcome has been saved as <i>Draft</i>	Panel to CH	Action: <i>Manage Priority Status</i> CHC in My CH Panel Convenor in Action: Return to CH	CHC to Panel Convenor Panel Convenor to CHC

11.1.1 Individual Access Request Panel Priority Outcome

Placement Panel Priority Outcome	Description
Draft	The status of a Priority in a Panel meeting is incomplete
Completed	Status of a Priority has been finalised and returned from Panel to the Clearing House Not able to modify 'Completed' Panel outcome

1.4. Creating a Clearing House Status

Clearing House Status	Description
Draft	A Clearing House is under construction
Available	Clearing House is open and priorities can be submitted to it
Completed	Clearing House no longer required and it is empty of priorities
Cancelled	Set up in error or is not required

1.5. Creating an Access Request Panel Status

Placement Panel Status	Description
Draft	Panel is under construction
Available	Panel is open and priorities can be submitted to it
Completed	All priority outcomes have been completed by the Panel and are back with the Clearing House
Cancelled	Panel set up in error or not required

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.

'Read Only' Field	Details
Student Name	Click to view the Access Request
SRN	
Scholastic Year (for current year)	Current Year
Date of Birth	
Gender	
Disability Codes	Click to view
Disability Confirmation Expiry Date	
Home Address	
Access Request Panel	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
Verification	Link to Access Request verification screen
Current:	
Census School	

'Read Only' Field	Details
Shared Enrolment	Yes or No
Shared Enrolment School	
Enrolment Type (Census)	Based on enrolment at the Census school
Sub Enrolment Type/Support Class	
Proposed:	
When provision is required	

2.2. Itinerant/Resource – Vision

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

Data Entry	Details
APV Support document signer (read only)	Name from Access Request
Intended Start Date	Select from calendar or enter dd/mm/year in full
Caseload per week (Hours and Minutes) Supplementary per week Hours	Caseload and Supplementary (Hrs and Mins) must not exceed 12 hours
Total Support Allocation per week (Hours and Minutes)	
Support Allocation per week (Minutes)	Numerical value
Monitor	Indicate yes or no
General Comment	Any additional details
Status of priority	Select from pull-down box
Status comment	Only if <i>Declined</i> is selected

2.3. Itinerant/Resource – Hearing

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

Data Entry	Details
APH Support document signer (read only)	Name from Access Request
Intended Start Date	Select from calendar or enter dd/mm/year in full
Caseload per week (Hours and Minutes) Supplementary per week Hours	Caseload and Supplementary (Hrs and Mins) must not exceed 8 hours
Total Support Allocation per week (Hours and Minutes)	
Support Allocation per week (Minutes)	Numerical value
Monitor	Indicate yes or no
Travel Time per week (Hrs)	Optional
Travel Time per week (Mins)	Optional
General Comment	Any additional details
Status of priority	Select from pull-down box
Status comment	Only if <i>Declined</i> is selected

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.

Data Entry	Details
ISTV per week (Hours)	Optional: Enter if known
ISTV per week minutes	Optional: Enter if known
ISTH per week (Hours)	Optional: Enter if known
ISTH per week minutes	Optional: Enter if known

Data Entry	Details
Integration Funding Support: View profile	Click to view details of summary profile screen from Access Request. Scroll down to see Access Domains, comments and level
Profile supported	Indicate yes or no
IFS recommended proceed to State Office	Indicate yes or no
General Comment	Any additional details
Status of priority	Select from pull-down list
Status comment	Only if Declined is selected

2.5. Special School/Centre and Support Classes (excluding Early Intervention, Distance Education 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.

Data Entry	Details
Intended Start Date	Select from calendar or enter dd/mm/year in full
Shared enrolment	Select yes or no
If no, name of census school	Use magnifying glass to select school – restricted by ES
If yes, name of census school	Use magnifying glass to select school – restricted by ES
If yes, name of shared enrolment	Use magnifying glass to select school – restricted by ES
School level: Enrolment Type/Support Class	Select from pull-down list and classes available at that school
Enrolment Type/Support Class	Select
Scholastic Year	Select
If a Special School, Pervasive Development Characteristics	Indicate yes or no

Data Entry	Details
Factor of Need	Select from pull-down list and only those Factor of Needs related to selected class will show
General Comment	Any additional details
Status of priority	Select from pull-down list
Status comment	Only if Declined is selected

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*.

Data Entry	Details
Intended Start Date	Select from calendar or enter dd/mm/year in full
Shared enrolment	Select yes or no Note: If yes to shared enrolment, census school copied from current
If shared enrolment	Use magnifying glass to select school – not restricted to one ES
If yes, name of shared enrolment	Use magnifying glass to select school – not restricted to one Educational Services
If no, select census school	Use magnifying glass to select school – not restricted to one Educational Services
School Placement Type	Select from pull-down list and classes available at that school
Enrolment Type/Support Class	Select from pull-down list and classes available at that school
Scholastic Year	Select
Factor of Need	Select from pull-down list and only those <i>Factor of Needs</i> related to selected class will show
General Comment	Any additional details

Data Entry	Details
Status of priority	Select from pull-down list
Status comment	Only if <i>Declined</i> is selected

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.

Data Entry	Details
Current: Current Settings	Child's current arrangements
Intended Start Date	Select from calendar or enter dd/mm/year in full
Shared Enrolment	If no, enter census school. If yes, Census school auto-completed but entry can be changed.
Census School	
If shared enrolment	Use magnifying glass icon to select school – not area restricted
If yes, name of shared enrolment	Use magnifying glass icon to select school
If no, select census school	Use magnifying glass icon to select school
Number of Sessions	Optional
Enrolment Type/Support Class	Select from pull-down list only those available at school will be available
Scholastic Year	Select
General Comment	Any additional details
Status of priority	Select from pull-down list
Status comment	Only if <i>Declined</i> is selected

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 and Resource* Priority request.

Data Entry	Details
Intended Start Date	Select from calendar or enter <i>dd/mm/year</i> in full
School Placement Type	Select from pull-down list
Number of Sessions	Optional
General Comment	Any additional details
Status of priority	Select from pull-down list
Status comment	Only if <i>Declined</i> is selected

Appendix 3: Email Notifications

The system automatically emails appropriate persons when certain important actions take place.

Post Office – Access Requests in Post Office

Action	Effects	Condition	Email TO	Email cc
Transfer to Post Office	AR	Always	Snr Post Office Administrator (TO Principal Network)	Snr Post Office Administrator (FROM Principal Network)
Return to School	AR	Always	Assigned Principal	Snr Post Office Administrator
Withdraw AR	AR	Always	Snr Post Office Administrator, Assigned Principal	
Upload Attachment	AR	Allow school to upload	Assigned Principal, Author	

Clearing Houses – Access Requests in Clearing Houses

Action	Effects	Condition	Email TO	Email cc
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Transfer to Post Office	AR	P2/P3 assigned to CH then email CH Coordinator	Snr Clearing House Coordinator (TO Principal Network)	Clearing House Coordinator (P2/P3) (FROM Principal Network), Snr Clearing House Coordinator (FROM Principal Network)
Transfer to Clearing House	AR	P2/P3 assigned to CH then email CH Coordinator	Clearing House Coordinator (TO Principal Network)	Clearing House Coordinator (P2/P3) (FROM Principal Network), Snr Clearing House Coordinator (TO Principal Network)
Withdraw AR	AR	P2/P3 assigned to CH then email CH Coordinator	Assigned Principal	Clearing House Coordinator (P2/P3)
Return to School	AR	P2/P3 assigned to CH then email CH Coordinator	Assigned Principal	Clearing House Coordinator (P2/P3)
Upload Attachment	AR	Allow school to upload	Assigned Principal, Author	
Return to CH	Priority	Always	Placement Panel Convenors	
SCAS Registration	Priority	Always	Snr Clearing House Coordinator (TO Principal Network)	

Placement Panels – Access Requests in Placement Panels

Action	Effects	Condition	Email TO	Email cc
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Return to CH	Priority	Always	Clearing House Coordinator	Snr Clearing House Coordinator
Transfer to PP	Priority	If not PrePP → PP	Clearing House Coordinator	
Return to School	Priority	P2/P3 assigned to CH then email CH Coordinator	Clearing House Coordinator (P1)	Clearing House Coordinator (P2/P3), Snr Clearing House Coordinator
Upload Attachment	AR	Allow school to upload	Assigned Principal, Author	

Administer Placement Panels – Manage Placement Panels

Action		Condition	Email TO	Email cc
Send Meeting Notification		PP Available and members editable	Placement Panel Members	

Minor Actions

Action		Condition	Email TO	Email cc
Reports		Always	User	

Appendix 4: Processes related to Integration Funding Support

NOTE: For Access Requests where both *Integration Funding Support* and a *support class placement* need to be supported (e.g. one is supported now, the other for the following year) refer to [Section 10.7](#) to understand this process **before** the **final determinations** are made for each Priority.

Prior to panel

The Clearing House Coordinator will:

- **assess the information provided** in the Access Request - **if any changes are required** (e.g. changes to profile, additional information to support the levels provided) discuss with the school. Changes to profile are noted in the panel outcome
- If the application is ready to proceed, the Clearing House Coordinator will **assign the priority** for Integration Funding Support **to the appropriate Panel**.

Panel

The Panel Convenor will:

- select the tick box next to the student/s and under Actions select Enter Priority Outcome (Section 9.10.5).
- If the **Priority** for Integration Funding Support is to be **Supported**:
 - Complete all sections (1, 2, & 3) and ensure that the selections for Profile Supported and *Recommendation* (shown below) are changed to Yes.

<p>Integration Funding Support : View Profile</p> <p>*Profile Supported : <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>*IFS recommended proceed to State Office : <input type="radio"/> Yes <input checked="" type="radio"/> No</p>
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For all *Actions* available from the Panel see [Section 9.10](#).

After the panel

The Clearing House Coordinator will:

- search for *Priorities* for *Integration Funding Support* where the *Panel Priority Outcome* is *Completed* using the search filters shown below.

Outcome Category :	Integration, Funding Support	Outcome :	Completed Outcome
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- select the tick box next to the student/s and under *Actions* select *Manage Priority Status*. (Section 10.4)
- check the *Reviewed* tick box for the student/s and *Save*. ([Section 10.6](#))
- *create* the *State Office Integration FS* report ([Section 11.6.1](#)) which will automatically exports the applications by email to State Office.
- **Note:** the report will only include applications where the *Reviewed* tick box has been checked and the *Priority* for Integration Funding Support has been *Supported* by the Panel.

The status of the Access Request should remain **IN PROGRESS** until an email from State Office is received by the Learning and Wellbeing Advisor regarding the outcome of the application for Integration Funding Support.

Appendix 6: How to Copy 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."

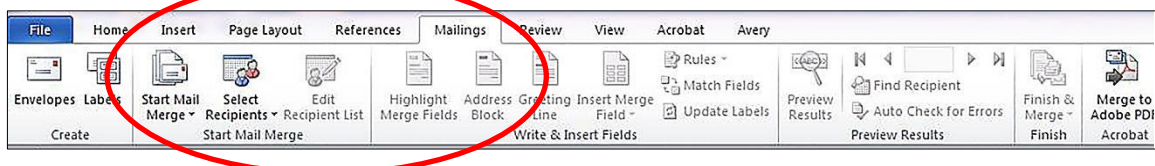
5 Check the document. The Excel table should now be in the Word document, in the spot where the cursor had been placed.

Read more: [How to Merge Excel Data Into Word Documents | eHow](http://www.ehow.com/how_4598223_merge-excel-data-word-documents.html#ixzz2TPHjCoNa)

http://www.ehow.com/how_4598223_merge-excel-data-word-documents.html#ixzz2TPHjCoNa

Appendix 7: Use mail merge to create and print letters (using data from an Excel file)

You will use *Start Mail Merge* commands on the **Mailings** tab to create a mail merge.



1. The mail merge process entails the following overall steps:
2. Set up the main document. The main document contains the text and graphics that are the same for each version of the merged document — for example, the support class offer in a form letter.
3. Connect the document to a data source – in this case the Extract Data for Letters report. (A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.)
4. Refine the list of recipients if required. Microsoft Word generates a copy of the main document for each recipient or item in your data file. If you want to generate copies for only certain records in your data file, you can choose which records to include.
5. Add placeholders, called mail merge fields, to the document. When you perform the mail merge, the mail merge fields are filled with information from your data file.
6. Previews, change individual documents and complete the merge. You can preview each copy of the document before you print the whole set. And you can change individual copies of the document.
7. Print letters and save a copy to .pdf for your records.