CHESSN Duplicate Quick Reference Guide

A guide to submitting CHESSN duplicates using HEIMS Administration

Contents

Access to HEIMS Administration........................................................................................................2
Accessing the Duplicate Management functionality........................................................................3
CHESSN Duplicates.............................................................................................................................4
How to create a batch............................................................................................................................4
CHESSN Duplicate and Duplicate Set.................................................................................................5
How to add a Duplicate Set – Type 1 batch.......................................................................................5
How to add a Duplicate Set – Type 2 batch.......................................................................................8
Following the Submission of a Batch ................................................................................................10
  Type 1...............................................................................................................................................10
  Type 2...............................................................................................................................................11
Managing batches...............................................................................................................................12
  Updating and deleting a batch...........................................................................................................12
  Updating and deleting records within a Type 1 batch....................................................................14
  Updating and deleting records within a Type 2 batch.....................................................................16
Access to HEIMS Administration

If you do not already have access to HEIMS Administration as an authorised user you must submit a completed Access to HEIMS applications form.

1. Open a web browser and enter the Education Portal URL: https://eduportal.education.gov.au/

2. Enter your user ID and password on the Education Portal log on page (Figure 1).

3. Select the HEIMS Administration tile from the Education Portal (Figure 2).
Accessing the Duplicate Management functionality

1. Select the Duplicate Management tab from HEIMS Administration (Figure 3).

**Figure 3 – Duplicate Management available from HEIMS Administration**

The Duplicate Management main page will be displayed. By default the batch list will appear in descending order from the date of creation, i.e. the latest batch will be displayed first.

**Figure 4 – CHESSN duplicate main page – CHESSN duplicate batch list**
CHESSN Duplicates

CHESSNs allocated through HEIMS are subject to data matching processes to ensure students previously allocated a CHESSN do not obtain a second one. While data matching reduces duplicate CHESSNs it cannot eliminate them. As such, the CHESSN duplicate functionality allows higher education providers and TACs to submit information to the department concerning the following two types of CHESSN duplicates:

- **Type 1 duplicates**: A single student has been issued with more than one CHESSN.
- **Type 2 duplicates**: Two students are issued with the same CHESSN. For example, a twin students apply to study at the same provider and their personal information is very similar, the system will treat the two students as the same individual and as a result only one CHESSN can be issued.

**How to create a batch**

1. Select **Add Batch** to create a batch.

**Batch**: Is used to manage the duplicate process and is the first step in submitting a request of potential Type 1 duplicates to the department. The following section steps through this process.
2 Select the type of batch required, type 1 or 2, from Batch Type drop down list and add details such as batch date, reference number and any comments and select Ok once all details provided.

The batch list from the home page will now refresh with your newly created batch appearing. When a batch is created, its status is *Entry in Progress* and candidate duplicates can be created and placed in a candidate set.

**CHESSN Duplicate and Duplicate Set**

**Candidate Duplicate**: A candidate duplicate is a CHESSN which has been identified as a potential Type 1 or Type 2 duplicate.

**Candidate Duplicate Set**: A candidate duplicate set contains a group of candidate duplicates.

A **Type 1** batch can contain one or more Type 1 candidate duplicate sets. Each Type 1 duplicate set must contain at least two different CHESSNs relating to the one student.

A **Type 2** batch can contain one or more Type 2 candidate duplicate sets. Each Type 2 duplicate set contains only one CHESSN, but information relating to two students.

A master CHESSN is the CHESSN that has been selected from a duplicate process as the most appropriate for a student. All other CHESSNs from the process become redundant.

**How to add a Duplicate Set – Type 1 batch**

1 Highlight the relevant batch and select *View Duplicates*.

*Figure 6 – CHESSN duplicate batch list – select View Duplicates*
2 Select **Add Duplicate Set**

**Figure 7 – Candidate duplicate set list – select Add Duplicate Set**

3 Enter the details of the first CHESSN that the student has.

4 If this CHESSN should be the master CHESSN then check the box **Most accurate CHESSN in duplicate set**.

At least one CHESSN within each set must be designated as the most accurate CHESSN.

**Figure 8 – Enter the details of the first CHESSN that the student has**

5 Select **Save & Add Another**.

A **Type 1 CHESSN duplicate set** must contain two or more CHESSNs relating to a single student.
6 Enter details of the second CHESSN relating to the same student.
7 If there are any more CHESSNs for the same student repeat step 4.

A **Type 1 CHESSN duplicate set** can contain CHESSNs that relate to a different student; however these must be recorded in a separate candidate duplicate set.

8 Once the last CHESSN for this student has been added to the set select **Save & Return to List**
9 Once you have completed entering all sets within a batch the batch select **Submit Batch**.

After submitting the batch to the department for processing, its status changes to **Decision Pending**.
How to add a Duplicate Set – Type 2 batch

1. Highlight the relevant batch and select **View Duplicates**.

   ![Figure 9 – CHESSN duplicate batch list – select View Duplicates]

2. Select **Add Duplicate Set**

   ![Figure 10 – Select Add Duplicates]

3. Enter the Confirming Data details and select **Validate**.

   Validating the CHESSN ensures it exists in HEIMS. If an existing CHESSN is found the Existing Student details will be automatically populated.

4. Select the Allocation Method radio button to confirm how the CHESSN was allocated.

5. Enter the Required Student with the details of the second student allocated with the same CHESSN and select **OK**.
Note: Request Number and Request Date fields are only required if the CHESSN was allocated via web services.

**Figure 11 – Enter Required Student details**

6 If there are any more type 2 candidate duplicate sets to be added to the batch repeat from step 2.

A **Type 2 CHESSN duplicate set** can contain details that relate different student; however these must be recorded in a separate candidate duplicate set.

7 Once the last student has been added to the set select **Submit Batch**.

After submitting the batch to the department for processing, its status changes to **Decision Pending**.
Following the Submission of a Batch

After submitting a within HEIMS Administration, a departmental officer will process the request. After the batch is processed the batch status will be displayed as *Finalised* on the batch list screen and an email is sent informing the nominated CHESSN Liaison.

1. Select the Duplicate Management tab from HEIMS Administration.
2. Highlight the relevant batch and select *View Duplicates*.

To assist with finding a batch limit the criteria can be used.

**Figure 12 – CHESSN duplicate batch list**

**Type 1**

This tab displays the sets as well as their candidate duplicates as originally entered. An *Approval Status* of Accepted indicates that the department records confirm the set contains Type 1.

**Figure 13 – Type 1 Candidate duplicates sets**
The outcome duplicate process is displayed in the **Finalised Type 1 duplicates sets** tab.

*Figure 14 – Finalised Type 1 duplicates sets*

For all accepted Type 1 duplicate sets the department will assign one of the CHESSNs within the set the status of Master. This is a very important decision and providers should ensure that the master CHESSN is used for all further transactions relating to the relevant student.

A CHESSN is a master CHESSN if the record is marked as Yes from the **Master CHESSN** column.

**Type 2**

This tab displays the sets as well as their candidate duplicates as originally entered. An **Approval Status** of Accepted indicates that the department records confirm that two people did exist with the same CHESSN.

When the department approves a Type 2 duplicate, the details of the first person that obtained the CHESSN remain linked to that CHESSN (referred to as the existing CHESSN). A new CHESSN is created for the second person. Providers should update the CHESSN for the second person with the newly created CHESSN.
Managing batches

Updating and deleting a batch

**Overview:** The following section describes the process of updating or deleting a previously created batch.

1. On a previously created batch, highlight a row from the list and select **Edit Batch**.

   ![Figure 15 – CHESSN duplicate batch list – select Edit Batch](image)

2. To update the batch, change the desired values and select **OK**.

   ![Figure 16 – CHESSN duplicate batch list – update batch details](image)
3  Alternatively, to remove the batch, select **Delete**. Deleting a batch is final and cannot be reversed.

*Figure 17 – CHESSN duplicate batch list – delete batch*

4  Repeat this process if you want to update or delete other batches.

**Note**: It is not possible to delete a batch that contains sets, unless the sets are deleted from within the batch first.
Updating and deleting records within a Type 1 batch

Overview: After a batch has been created and Type 1 duplicate sets have been added, some duplicates may need to be updated. The following section describes the steps to update and delete a candidate duplicate.

1. Highlight the relevant batch and select **View Duplicates** (double clicking the row will also perform this action).

   ![Figure 18 – CHESSN duplicate batch list – select View Duplicates](image1)

2. Highlight the relevant row and select **Edit Duplicate Set** (double clicking the row will also perform this action).

   ![Figure 19 – Candidate duplicate set list – select Edit Duplicate Set](image2)

   **Note:** It is not possible to update or delete a record from a set that has already been accepted.
3 Edit the desired fields and select the relevant **Save** option or select **Delete** to remove the duplicate record from the batch. If the candidate duplicate is the last remaining duplicate within a set, removing the candidate duplicate will also remove the set. Deleting a candidate CHESSN duplicate is final and cannot be reversed.

**Figure 20 – Candidate CHESSN Duplicate**

4 Repeat the same process if you wish to update or remove another duplicate from the batch.
Updating and deleting records within a Type 2 batch

**Overview:** Before submitting the batch it may be necessary to update some details of the Type 2 CHESSN. The following section steps through this process.

1. Highlight the relevant batch and select View Duplicates (double clicking the row will also perform this action).

   **Figure 21 – CHESSN duplicate batch list – select View Duplicates**

2. Highlight the relevant row and select *Edit Duplicates* (double clicking the row will also perform this action).

   **Figure 22 – Candidate duplicate list – select Edit Duplicates**
3 Edit the desired fields and select **OK** or select **Delete** to remove the duplicate record from the batch. Deleting a candidate CHESSN duplicate is final and cannot be reversed.

*Figure 23 — Candidate Type 2 CHESSN Duplicate*

**Candidate Type 2 CHESSN Duplicate**

- **Confirming Data**
  - Existing CHESSN:
  - Family Name:
  - Date of Birth:

- **Allocation Method**
  - How was this CHESSN allocated?
    - Web Services
    - Web Browser

- **Existing Student**
  - Given Name:
  - Family Name:
  - Date of Birth:
  - Request Number:
  - Request Date:

- **Required Student**
  - Given Name:
  - Family Name:
  - Date of Birth:
  - Request Number:
  - Request Date:

*Help*

A Type 2 duplicate occurs when a single CHESSN is allocated to two students. This screen enables information related to the two students involved in a Type 2 duplicate to be entered.

Enter the CHESSN and confirming data to identify the first student allocated with the CHESSN (Existing Student). Enter the details for the second student allocated with the CHESSN in the fields available under the label ‘Required Student’.

* denotes a mandatory field

- **Delete**
- **OK**
- **Cancel**