Background:

This User Guide provides an overview of how SAM/OLS is dealing with the requirement to obtain employer signoff <u>before</u> a unit outcome can be recorded in EBS.

For further details of this TAFE NSW requirement, <u>click here</u>.

Overview:

This flow chart demonstrates how the "Employer Endorsement of Competency" workflow operates within SAM/OLS.



What's new / changed?

The key changes can be summarised as follows:

- New subject marks status of "Employer Endorsement", which (see diagram):
 - Stops SAM sending a subject mark to EBS until employer endorsement is obtained; and
 - Triggers the new "Employer Endorsement of Competency Email" to be sent.
- The "Employer Endorsement Email" can also be triggered manually by the teaching section via Client > Client Details > Employer (see Appendix A).
- Employer provides electronic endorsement by clicking on the link in the "Employer Endorsement of Competency Email". SAM records this endorsement and converts the subject mark status from "Employer Endorsement" to "Approved", thus then releasing the subject mark (unit outcome/result) to EBS (see Appendix B).

EMMARKSF - Subject Marks - PREP (MDINTIGNANA@OTEN) Subject Subject Subject SAM ID: TAFE ID: 328282611 Tareaching Section: Mark: Course: Tareaching Section: Mark: Course: Tareaching Section: Mark: Course: Satus: Pending Pass SAM Ed: Citered Note: OTEN AHCPCM022 Z: Find %s Enployer Endorsement Pending Pace System Pace System Pending Pace System Pending Pace	Action Edi	t Query Block	Record Fi	eld <u>H</u> elp <u>W</u> indow									
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- New Employer Endorsement for Apprentice and Trainee Mail Merge (see Appendix C):
 - Allows teaching sections to follow up any outstanding employer endorsements; and
 - Meet our compliance requirements of maintaining appropriate evidence of endorsement.

Appendix A: The Employer Tab within **SAM Client Details Screen**

This screen has been updated to allow teaching sec to:

• See when the last Employer Endorsement Email was sent.

NOTE: Teaching sections should refer to Client > Events History > Events for a full history of emails sent and employer endorsements received.

- Generate a new email to be sent, • either because:
 - A previous email was misplaced;
 - The email needs to be sent to an alternative person/email address.

NOTE: An Employer Endorsement Email can only be sent if:

- The "Contact Person" and "Email Address" fields are populated; and
- There is a pending subject mark status of "Employer Endorsement".

	Client Statistics Contacts Help Win	dow	
/ithin the	CLMCLPDF - Client Details - PREP (MI	DINTIGNANA@OTEN)	
	SAM ID: N1016892	TAFE ID: 332882511 USI: FWPQGJJQRR	Disability Help: 🗖
ing sections	First Name: BRADEN	Middle Name: GLEN Surname: FITZGERALD	
	General Other Detail	s Postal Address Residential Address Phones and Emails Intro to teacher	s Employer
Action Edit Query Bl			
	Employer Name: TAFE D	igital - Entertainment Unit	
E CLEVNISF - Client EV	Contact Person: Magic	Mike	
Enrol Form No: 10158	Contact Phone: 0403 12	23 123 Contact Fax: 0403 123 123	
First Name: SCOT	Address: 51 WEM	TWORTH ROAD	
Course No: UEE3			
		HEIELD	
Events	States NEW	Destande 2425	
Data Event	State: INSW		
Date Event			
09/03/2021 Employe	Email Address: magici	nike@tafedigital.com.au	
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09/03/2021 Subject	Employer Endorsement E		
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09/03/2021 Result S			
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09/03/2021 Result S	in Result Entered	Subject: UEENEECO20B, Result Slip: S2053500, Result: S	
09/03/2021 Result S	lip Result Entered	Subject: UEENEECO20B, Result Slip: 52053600, Result: 5	MARIA DINTIGNANA
09/03/2021 Result S	lip Result Entered	Subject: UEENEEC020B, Result Slip: S2053477, Result: S	
09/03/2021 Subject	Status Changed to Completed	Subject No: UEENEEG102A previous status was Enrolled.	SAM GENERIC
09/03/2021 Result S	lin Result Entered	Subject: IFENEEC004R. Deput: Slip: \$2053454. Deput: S	MARIA DINTIGNANA
09/03/2021 Employe	r Endorsement Received for UOC	Subject(s): UEENEEG102A; Maria Diggy, maria@activefireservices.com.au	WBOLS
09/03/2021 Employe	r Endorsement Requested for UOC	Employer Endorsement of Units(s) of Competency - Subject(s): UEENEEG102A; email	MARIA DINTIGNANA
	New Query Find	<u>Cancel</u> Close	

Appendix B: MATE e-correspondence emails for Employer Endorsement

An "Employer Endorsement of Competency Email" can be generated 2 ways:

- Automatically by SAM every time a subject mark converts to "Employer Endorsement" status (process run every hour); and
- Manually by the teaching section via **Client > Client Details > Employer** screen within SAM (see Appendix A above).

There are 2 types of "Employer Endorsement Emails":

• Like any other e-correspondence that is sent via IDM, EBS or SAM/OLS, you can view these emails and the conditions under which they are sent via the MATE microsite.

https://sam.oten.tafensw.edu.au/otenweb/mate/

Image: Same state Identity Management ebs SAM/OLS	INTRODUCTION D	MATE TIMELINE 📙	SHOW ME 🐵
Pre-enrolment			~
Fees and payments			~
Enrolment and on-boarding (from enrolling to completion of first unit)			~
VSL - Vet Student Loan			~
Progression through course units			~
Trainee/Apprentice			>
Employer Endorsement of Unit(s) of Competency 🖂			
Employer Endorsement of Competency (Qualification	ion) 🖂		
Nearing completion			~

Upon completion of each unit of competency					Upon completion of last remaining unit (+ qualification endorsement)				
ΝΟΤ	E: Every time an ema	il is sent,	it will list (all outstan	ding ur	nits that need end	orsement	!	
Employer Endorsement of	Unit(s) of Competency 🛛 Message ty	pe: Emall		Employer Endors	sement of Corr	npetency (Qualification) 🛛 🖂 Me	essage type: Emal	I	
Explanation: Requesting the employer to co workplace.	nfirm that their trainee/apprentice's skills are com	petently applied in the	VIEW EMAIL	Explanation: Requesting the employer to confirm that their trainee/apprentice is competent to industry standards and that they support the issue of the qualification by TAFE NSW.					
Conditions: To the employer of a traine Sent every time a trainee/a Requesting employer's end + Unit outcomes/result	 Conditions: To the employer of a trainee/apprentice. Sent when a trainee/apprentice completes their last unit of competency and may be eligible to receive their qualification. Requesting employer's endorsement of the trainee's/apprentice's competence to industry standards. Qualification cannot be finalised in EBS and testamur cannot be issued until endorsement is obtained. 								
Example of email sent to	students			Example of email	sent to stude	nts			
Employe	er Endorsement of Unit(s)	of Compete	ency	Employer Endorsement of Competency					
We are writing to you in re Ye To finalise the result of a (skills gained by <i>"Student</i> applic	nt in <i>"Course Name"</i> , d to confirm that the 3) are competently	Dear "Employer Contact Person", We are writing to you in regards to your "Student Type", "Student Name" and their enrolment in "Course Name", "Course Number", ending on "Enrolment End Date". Your "Student Type" has recently completed their last unit of competency and may be eligible to receive their qualification. To issue the qualification, TAFE NSW (RTO Code: 90003), as a registered training organisation, must obtain the employer's endorsement of the "Student Type" scompetence to industry standards.							
• Review the Elem	What you need to do:	clicking on the link(s)	in the table.	What you need to do: Review the Elements and Performance Criteria for each unit by clicking on the links in the table.					
lloit Number lloit Na	ne Flements and Derformance Criteria	Unit Autcome	Nate Achieved	Unit Number	Unit Nama	Elemente and Performance Criteria	linit Outcomo	Pata Ashiavad	
"Unit Number" "Unit N	ame" "Unit URL"	"Unit Outcome"	"Outcome Date"	""Unit Number"	*Unit Name*	"Unit URL"	"Unit Outcome"	"Outcome Date"	
• Endorse If you wish to discuss a "Tea	 Endorse the on-the job competency for each unit and that "Student Name" is competent to industry standards in the nominated vocation ("Course Name", "Course Number") by clicking on the green button below. I understand that by providing this endorsement, I "Employer Contact Person", acting as the employer representative of "Employer Name". I confirm my "Student Type"s competence and support the issue of the qualification by the RTO; and I may be obliged to pay a higher rate as a result of the qualification being issued (check award requirements); and I and/or my "Student Type" can seek to complete the "Student Type"ship before the nominal completion date OR continue the "Student Type"ship up to the nominal completion date. I provide my Employer Endorsement If you wish to discuss any aspect of this email, please contact us on "Teaching Section Phone Number", "Teaching Section 1300 Phone Number", "Teaching Section Email". 								
					Thank you.				

Appendix C: Employer Endorsement for Apprentices and Trainees Mail Merge

The purpose of this report (ENEMPENM: Employer Endorsement for Apprentices and Trainees) is to help teaching sections to:

- Identify situations where SAM was not able to send an Employer Endorsement email (e.g. a contact person and/or email address is missing), thereby requiring teaching section action to update the employer's details and generate a new email via the Client > Client Details > Employer screen).
- Follow up any outstanding employer endorsements requests.
- Meet our compliance requirements of maintaining appropriate audit evidence (e.g. append an extract of this report to the students Training Plan on TPL to demonstrate we have obtained electronic endorsement from the employer).

This report can be run via Reports > Reports Gateway in SAM.	Action Fait Gneth Riccia Field Helb Million	
	SERPGWYF - Reports Gateway - PREP (MDINTIGNANA@OTEN)	_ 🗆 🗙
	Module Category	
Action Edit Query Block Record Field Help Window	Module Type: MAIL MERGE 🖳 Privileges: I Can Run 💌 Gateway Module: Yes 💌	_
🙀 SEREQMMF - Request Mail Merge - PREP (MDINTIGNANA@OTEN)	In Sub System: ENROLMENT	
	Roles	
Sub System: Enrolment	Run When: In Business Hours	
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	FAC - OLP Clerical Role	
Open Output in the Browser	FAC - Supervisor of Clerical OLP	
C Save Output to C:(TEMP\OUTPUT.otn (for Excel Templates only	Y) Medule Detaile	
	Module Details	
Current Status:	Module Name: ENEMPENM 🖳 Employer Endorsement for Apprentices and Trainees Template?: No 💌	
Daramatar Nama Mandatary Valua	Parameters: P LOCATION NO IMI, P PENDING MARKS ONLY IMI, P CE END FROM DATE, P CE END TO DATE, P FACULTY.	
Location No.	P_TEACHING_SECTION, P_FUNCTIONAL_TS, P_COURSE_NO, P_TAFE_ID	
Pending Subject Marks Only (Y/N)	Output Fields: Teaching Section. Course No. Course Name. Trainee/Apprentice. TAFE ID. SAM ID. DEC USER ID. Student Firstname. Student	
Course Enrolment End From Date	Surname, Course Start Date, Course End Date, Course Enrol Status, Subject No, Subject Ed, Subject Name, Subject Status,	
Course Enrolment End To Date	EBS Mark, Date Awarded, Mark Status Date, Subject Mark Status, Email Sent, Email Date, Email Address, Uoc Endorsed By, Ulos Endorsed Date, Qualification Endorsed By, Qualification Endorsed Date	
Faculty		
Teaching Section		
Functional Teaching Section code	Sort Order: ENROLMENT FORM NUMBER, MARK STATUS DATE, SUBJECT ENROLMENT SEQUENCE NUMBER	
Course No		
Tafe Id	Description: 🗛 apprentice or trainee will appear on this report as soon as they are captured by the "Employer Endorsement" process 🔺	
	(e.g. a subject mark is calculated and flagged for "Employer Endorsement"). Until then, they will not appear on this report.	
	The purpose of this report is to help teaching sections to:	-
		<u> </u>
	New Query Find Run Preview Save Cancel	Close
New Query <u>F</u> ind <u>Mail Merge</u> <u>Cancel</u>	Close	