



# **Step by Step Instructions**

## **How to use the PEN Web Application**

Last Updated: June 2018

**Step by Step Instructions**  
**How to use the PEN Web Application**

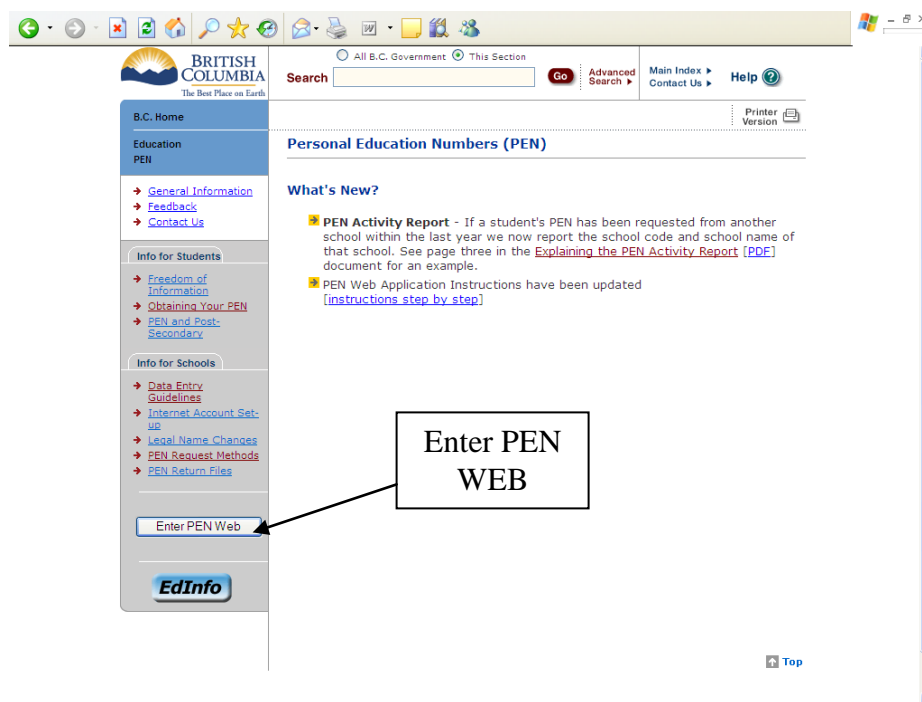
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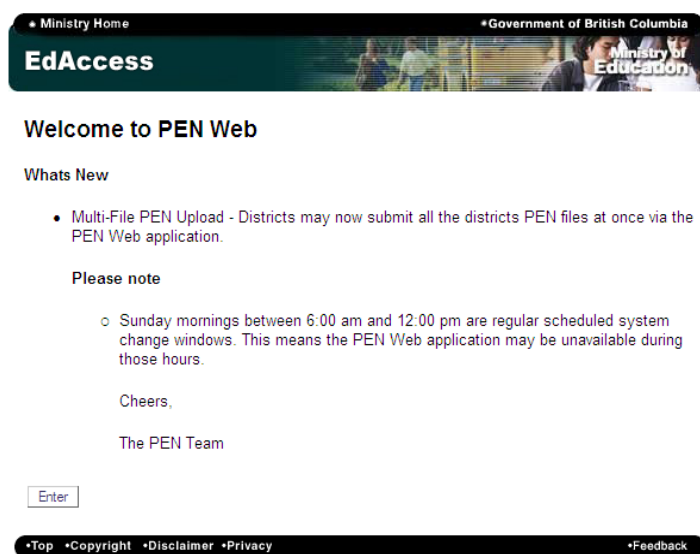
## Step by Step Instructions How to use the PEN Web Application

### Submission – Logging on and sending PEN requests

1. **Homepage.** Using your web browser (i.e. Internet Explorer), navigate to the PEN home page at [www.bced.gov.bc.ca/pen](http://www.bced.gov.bc.ca/pen). The below page will be displayed. Use your mouse and click on the Enter PEN Web button on the left of the page.



2. **Welcome.** After you click the 'Enter' button you are brought to the PEN Team's message about the web system and any changes, enhancements or anything upcoming that may be happening. We will change this message from time to time. Once you have read the message click on the 'Enter' button as indicated in the sample page below.




## Step by Step Instructions How to use the PEN Web Application

3. **Logon.** Now that you have selected the 'Enter' button you are directed to the Secure PEN Web Access page and prompted for your username and password as indicated below. Your username and password have been e-mailed to you by the PEN Team. If you have not received a username and password please e-mail [pens.coordinator@gov.bc.ca](mailto:pens.coordinator@gov.bc.ca) and include the following: name, school code, school phone number and principal's name.

• Ministry Home

• Government of British Columbia

**EdAccess**

### Secure PEN Web Access

**Principal & District Logon**

Principal or District ID:

Password:

Logon

[Forgot your password? Click here.](#)


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4. **Password Reset.** Upon your very first log-in or if your password has expired you will see the screen below and be prompted to change your password. Read the password requirements, set all fields and hit 'Logon'. A second screen will appear asking you to re-enter your password reminder question and hit 'Logon'. NOTE - This answer will gain you access to the system if you forget your password.

• Ministry Home

• Government of British Columbia

**EdAccess**

**Change Password**

Your password has expired. Please enter a new password, reminder question and answer. **Your password must be a minimum of 6 characters and contain at least one number or special character. Note that passwords are case sensitive.**

New Password:

Confirm New Password:

Password Reminder Question:

Password Reminder Answer:

Logon

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## Step by Step Instructions How to use the PEN Web Application

### Contact Information Screen

Once logged on your Contact Information will be displayed: Name, Email, and School, along with the main menu displaying 8 different menu options. A copy of this screen is below.

**Please ensure your contact information is up-to-date.** This page only appears when you first log onto the system or by selecting the cancel button from any of the subsequent pages/actions. On all other pages the navigation appears as it does in the Quick Menu section of this document.

• Ministry Home • Government of British Columbia

# EdAccess

## Secure PEN Web Access

TSW-20

**User Information** [\[Update Contact Information\]](#)

Name:  
Email:  
School:

← Your contact information will appear here

**Menu**

- [Update Contact Information](#)
- [Submit PEN Requests](#)
- [Upload PEN Requests](#)
- [Review PEN Requests](#)
- [Download Files](#)
- [Change Password](#)
- [Change Reminder](#)
- [Logoff](#)

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### Quick Menu

The following menu is used throughout the application. Please use this menu to navigate the different functions and perform different tasks.

**Quick Menu**

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Review Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

TSW-2036

## Step by Step Instructions How to use the PEN Web Application

### Menu Option # 1 - Update Contact Information

Using this option you can change the contact information for your school. Once finished, click 'Save' and the information is updated. To perform a different action use the 'Quick Menu' or click 'Cancel' and you are returned to the main menu. Please note, once the information is changed it will update the ministry system automatically.

The screenshot displays the EdAccess web application interface. At the top, there is a navigation bar with links for 'Ministry Home' and 'Government of British Columbia'. Below this is a banner for 'EdAccess' and 'Ministry of Education'. A 'Quick Menu' section contains links: 'Update Contact', 'Submit Requests', 'Upload Requests', 'Review Requests', 'Download', 'Password', 'Reminder', and 'Logoff'. The 'Update Contact Information' form is the central focus, featuring input fields for 'E-Mail:', 'Contact Person:', 'School Name:', 'Fax:', and 'Ministry School Code (8 digits):'. There are 'Save' and 'Cancel' buttons at the bottom of the form. A footer bar contains links: 'Top', 'Copyright', 'Disclaimer', 'Privacy', and 'Feedback'. The text 'TSW-2036' is visible in the bottom right corner of the form area.

**Important Note:** To submit a request for more than one NEW PEN it is recommended that you produce the PEN request extract from your Student Administration system. Upload the file using menu option number 4 'Upload PEN Requests' in the main menu or quick menu.

### Menu Option # 2 - Submit Pen Requests

This is a data entry screen for schools that may only require one PEN or not have a school administration system. If the information you enter is an exact match to the information in the ministry PEN system you will receive the PEN back immediately in your browser window. If there is no exact match with the ministry then you will add the record to a batch and your file will be returned at a later time. You will receive an email indicating when your results are ready to be picked up online.

Enter all the demographic information for the student into the appropriate fields and click the 'Attempt Match' button.

## Step by Step Instructions How to use the PEN Web Application

If you are confident the student is new to the Province or first time registrant, please select the “check box” at the top of the form. This will send your request directly to batch.

☐ Please select this option if the student you are entering is new to the Province or school system, this will send your request directly to the Ministry.

1) Enter the student's name as it appears on legal documentation:

Surname	First Name	Middle Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

☐ Click here if the student does not have a middle name on their legal documentation.

2) Enter the student's name as they prefer to be called (if different):

Surname	First Name	Middle Name
<input type="text"/>	<input type="text"/>	<input type="text"/>

3) Enter the student's birth date as YYYYMMDD (4 digit year, no spaces or slashes):

4) Enter the appropriate gender for the student:

☐ Male ☐ Female

5) Enter the student's home postal code with no spaces (A#A#A#):

6) Enter the student number from your local student administration system:

If the information you enter is not an exact match to a student currently in our system you will be prompted with a message stating that the information is not an exact match.



- No student was found matching those criteria.

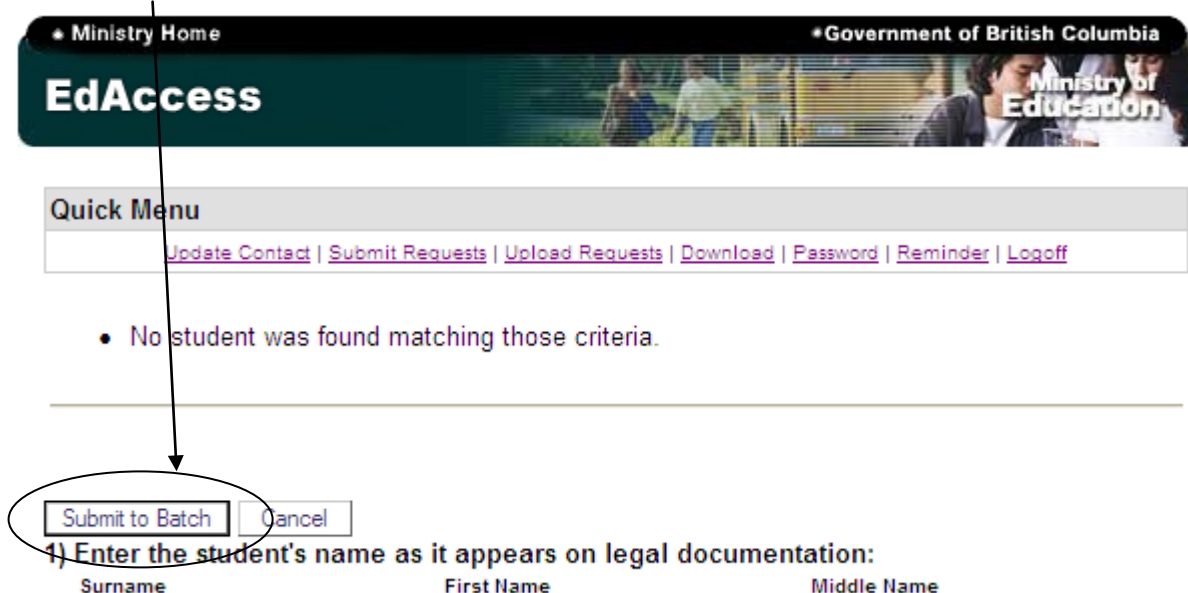
☐ Please select this option if the student you are entering is new to the Province or school system, this will send your request directly to the Ministry.

1) Enter the student's name as it appears on legal documentation:

At this point, the system gives you an opportunity to change information in case you forgot a data element or made a slight typo. If you need to make a change to the data, you can change it here. If no change is required, click the “Attempt Match” button again.

## Step by Step Instructions How to use the PEN Web Application

The system then tries to match your data to data in the ministry system again. If no match is found the following page appears: Notice the button has changed from 'Attempt Match' to 'Submit to Batch'.



Ministry Home Government of British Columbia

# EdAccess

Ministry of Education

Quick Menu

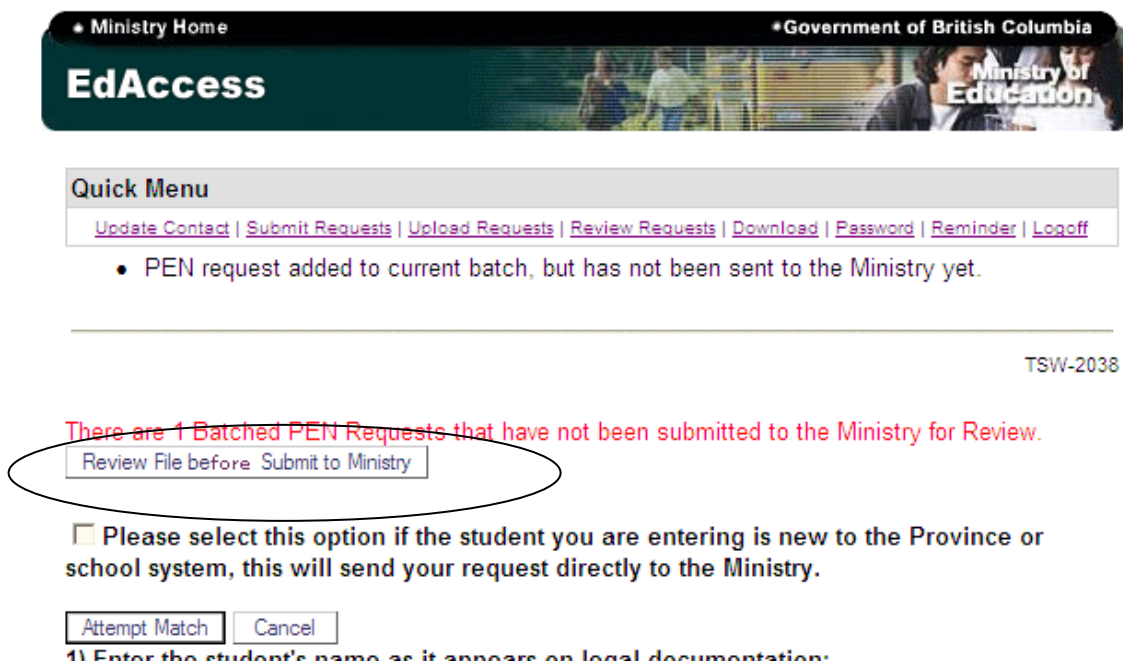
[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

- No student was found matching those criteria.

1) Enter the student's name as it appears on legal documentation:

Surname First Name Middle Name

Please click 'Submit to Batch'. If you are done you can click "Review File before submit to Ministry" or continue entering other student PEN requests.



Ministry Home Government of British Columbia

# EdAccess

Ministry of Education

Quick Menu

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Review Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

- PEN request added to current batch, but has not been sent to the Ministry yet.

TSW-2038

There are 1 Batched PEN Requests that have not been submitted to the Ministry for Review.

☐ Please select this option if the student you are entering is new to the Province or school system, this will send your request directly to the Ministry.

1) Enter the student's name as it appears on legal documentation:



## Step by Step Instructions How to use the PEN Web Application

Once you are ready to review your request the following screen will appear:

Ministry Home Government of British Columbia

# EdAccess

Ministry of Education

**Quick Menu**

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Review Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

TSW-2043

[Delete all Selected](#) [Submit to Ministry](#) [Show Possible Errors](#)

	<a href="#">Local ID</a>	<a href="#">Legal Surname</a>	<a href="#">Legal Given Name</a>	<a href="#">Legal Middle Name</a>	<a href="#">Usual Surname</a>	<a href="#">Usual Given Name</a>	<a href="#">Usual Middle Name</a>	<a href="#">Gender</a>	<a href="#">Date of Birth</a>	<a href="#">Error Count</a>	
<input type="checkbox"/>	<a href="#">1234</a>	SMITH	JOHN	HENRY				M	20030821	0	<a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">12345</a>	SMITH	CHRISTINA	MARIE				F	19700821	1	<a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">123456</a>	NULL	STUDENT	TEST				M	20030506	2	<a href="#">Delete</a>

[Select ALL](#) [Deselect ALL](#) [Back](#)

[Top](#) [Copyright](#) [Disclaimer](#) [Privacy](#) [Feedback](#)

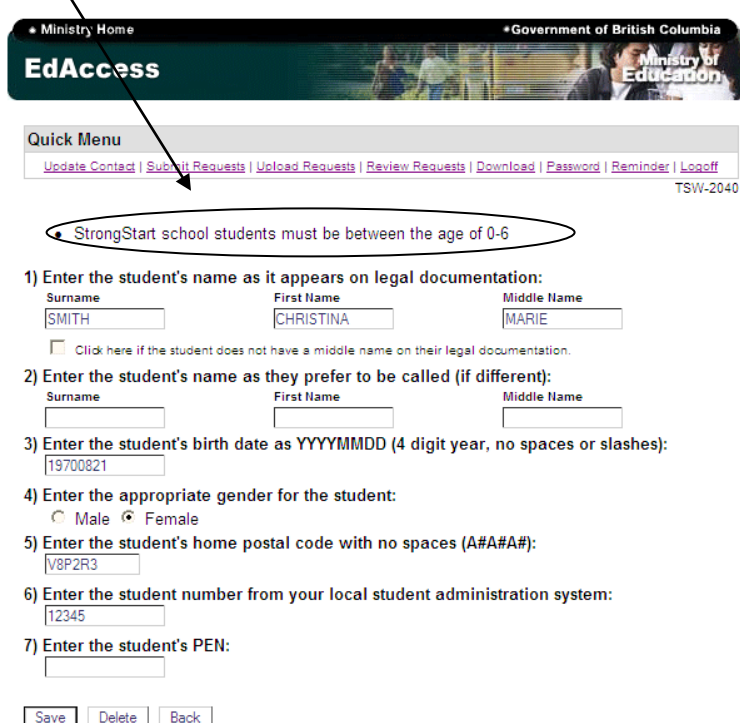
A list of students that were entered will display. The web application will now do a cursory check to advise if the record has any potential errors, help identify mistyped information and give the ability to delete erroneous records.

From the above screen you may also sort records, show possible errors, select specific records, delete specific or all records and submit your request to the ministry.

**Please note:** Records with errors can still be submit to the ministry for review and even if the record does not have a preliminary error the record may still conflict with a record in the PEN system and require ministry review. The review screen will need to be cleared either via submitting to the ministry or deleting your request before you can load another file.

## Step by Step Instructions How to use the PEN Web Application

To view the student's potential error and/or make changes to the student record, please select the student's Local ID to view the more detailed data entry screen. The error message will display at the top of the screen. In the following example a Strong Start Centre entered a student who did not meet the age requirements for a Strong Start Centre.

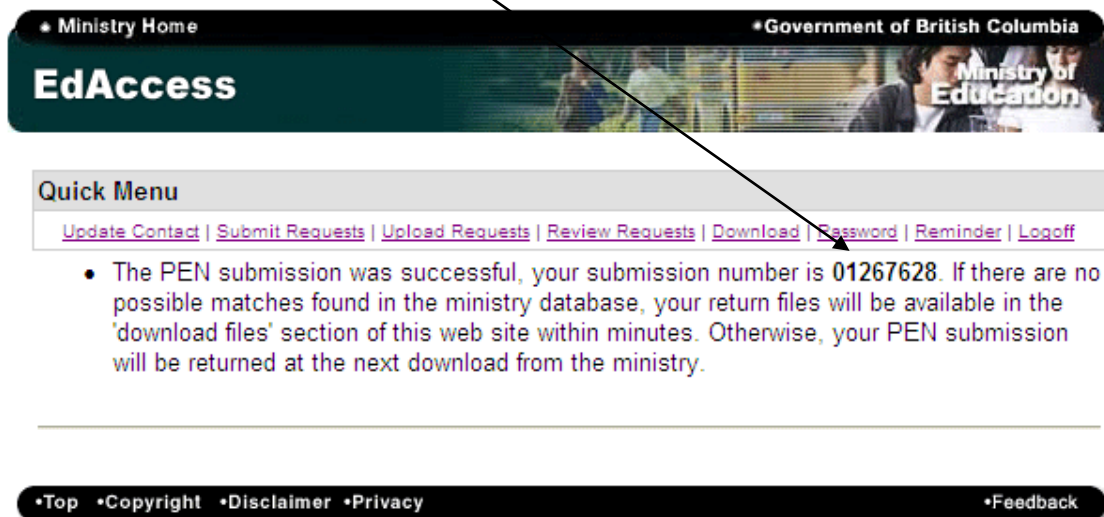


The screenshot shows the EdAccess web application interface. At the top, there is a header with "Ministry Home" and "Government of British Columbia". Below the header is a banner for "EdAccess" and "Ministry of Education". A "Quick Menu" bar contains links: "Update Contact", "Submit Requests", "Upload Requests", "Review Requests", "Download", "Password", "Reminder", and "Logout". A message at the top states: "StrongStart school students must be between the age of 0-6". The form contains seven numbered sections for data entry:

- 1) Enter the student's name as it appears on legal documentation:  
Surname: SMITH, First Name: CHRISTINA, Middle Name: MARIE  
☐ Click here if the student does not have a middle name on their legal documentation.
- 2) Enter the student's name as they prefer to be called (if different):  
Surname: , First Name: , Middle Name:
- 3) Enter the student's birth date as YYYYMMDD (4 digit year, no spaces or slashes):  
19700821
- 4) Enter the appropriate gender for the student:  
☐ Male ☒ Female
- 5) Enter the student's home postal code with no spaces (A#A#A#):  
V8P2R3
- 6) Enter the student number from your local student administration system:  
12345
- 7) Enter the student's PEN:

At the bottom are buttons for "Save", "Delete", and "Back".

If you choose to select "Submit to Ministry" you will receive a message with a submission number:



The screenshot shows the EdAccess web application interface after a successful submission. The header and banner are the same as in the previous screenshot. The "Quick Menu" bar is also present. A message states: "The PEN submission was successful, your submission number is 01267628. If there are no possible matches found in the ministry database, your return files will be available in the 'download files' section of this web site within minutes. Otherwise, your PEN submission will be returned at the next download from the ministry." At the bottom, there is a footer with links: "Top", "Copyright", "Disclaimer", "Privacy", and "Feedback".

## Step by Step Instructions How to use the PEN Web Application

Your files will be processed and returned to your web account for retrieval. You will receive an email when your file(s) is ready for you to retrieve.

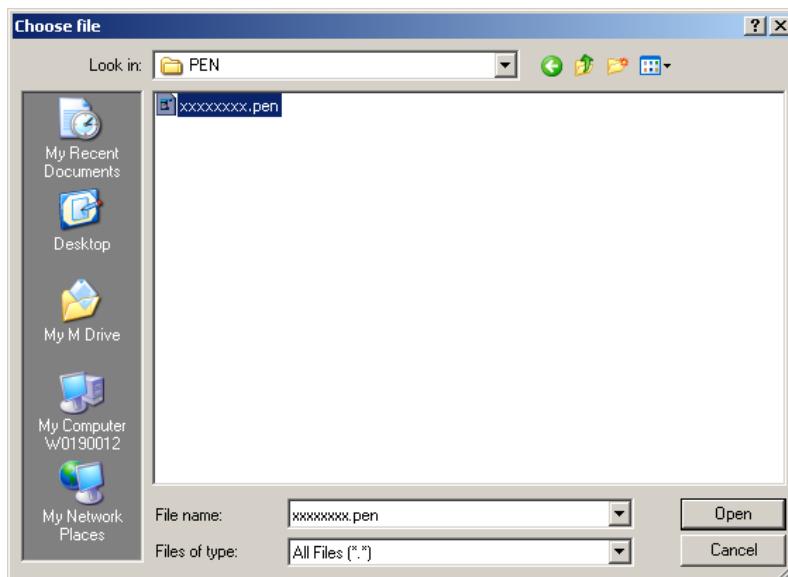
### Menu Option # 3 - Upload Pen Requests

To upload your PEN request file, follow the same procedures as you currently perform for creating your PEN request extract from your student administration.

Select option three 'Upload PEN Requests' from the main menu. The following page displays.

The screenshot shows the EdAccess web application interface. At the top, there is a dark blue header bar with "Ministry Home" on the left and "Government of British Columbia" on the right. Below this is a banner image with the text "EdAccess" and "Ministry of Education". Under the banner is a "Quick Menu" section with links: [Update Contact](#), [Submit Requests](#), [Upload Requests](#), [Review Requests](#), [Download](#), [Password](#), [Reminder](#), and [Logoff](#). Below the menu is a section titled "Upload PEN formatted file for processing:". It contains a "File:" label, a text input field, a "Browse..." button, and "Submit" and "Cancel" buttons. At the bottom of the page is a dark blue footer bar with links: [Top](#), [Copyright](#), [Disclaimer](#), [Privacy](#), and [Feedback](#). The text "TSW-2034" is visible on the right side of the page.

Click "browse" and navigate to the location where you saved your PEN request extract so you can select the file from your computer. The procedure would be something like the following screen shots:



## Step by Step Instructions How to use the PEN Web Application


Select your file and click the 'Open' button in the dialog box. This will insert the path of your file into the web upload form allowing the application to upload your file. Once you select 'open', the web page displays as indicated below, notice it has copied the path of your file into the form.

Upload PEN formatted file for processing:

File:

Now click the 'Submit' button to submit the file for your review. The review screen as described in Menu option #2 will display. Once you are satisfied with your file you may hit "Submit to ministry" and you will receive a submission number if this process completed successfully, as indicated below:

[Ministry Home](#) [Government of British Columbia](#)

**EdAccess** 

**Quick Menu**

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Review Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

- The PEN submission was successful, your submission number is **01267628**. If there are no possible matches found in the ministry database, your return files will be available in the 'download files' section of this web site within minutes. Otherwise, your PEN submission will be returned at the next download from the ministry.

[Top](#) [Copyright](#) [Disclaimer](#) [Privacy](#) [Feedback](#)

If your file is error free you will receive your PEN request back within minutes, please see the 'Download Files' section of these instructions for detailed information on how to retrieve your request.

### Menu Option # 4 – Review Requests

The Review Requests option gives you the ability to review your file for potential errors before submitting to the ministry. You may also submit your file to the ministry from this screen.

A list of students that were entered either through the submit or upload requests options will display. The web application will do a cursory check to advise if the record(s) has any potential errors. The display screen will help you to identify mistyped information and give you the ability to delete erroneous records. You may also sort records, show possible errors, select specific records, delete specific or all records and submit your request to the ministry.

**Please note:** Records with errors can still be submit to the ministry for review and even if the record does not have a preliminary error the record may still conflict with a record in the PEN system and require ministry review. The review screen will need to be cleared either by submitting the request to the ministry or deleting your request before you can load another file.

## Step by Step Instructions How to use the PEN Web Application

Ministry Home Government of British Columbia

# EdAccess

Ministry of Education

**Quick Menu**

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Review Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

TSW-2043

Delete all Selected Submit to Ministry Show Possible Errors

	Local ID	Legal Surname	Legal Given Name	Legal Middle Name	Usual Surname	Usual Given Name	Usual Middle Name	Gender	Date of Birth	Error Count	
<input checked="" type="checkbox"/>	<a href="#">1234</a>	SMITH	JOHN	HENRY				M	20030821	0	<a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">12345</a>	SMITH	CHRISTINA	MARIE				F	19700821	1	<a href="#">Delete</a>
<input type="checkbox"/>	<a href="#">123456</a>	NULL	STUDENT	TEST				M	20030506	2	<a href="#">Delete</a>

Select ALL Deselect ALL Back

Top Copyright Disclaimer Privacy Feedback

To view the student's potential error and/or make changes to the student record, please select the students Local ID to view the more detailed data entry screen. The error message will display at the top of the screen. In the following example a Strong Start Centre entered a student who did not meet the age requirements for a Strong Start Centre.

Ministry Home Government of British Columbia

# EdAccess

Ministry of Education

**Quick Menu**

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Review Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

TSW-2040

StrongStart school students must be between the age of 0-6

1) Enter the student's name as it appears on legal documentation:

Surname  First Name  Middle Name

☐ Click here if the student does not have a middle name on their legal documentation.

2) Enter the student's name as they prefer to be called (if different):

Surname  First Name  Middle Name

3) Enter the student's birth date as YYYYMMDD (4 digit year, no spaces or slashes):

4) Enter the appropriate gender for the student:

☐ Male ☒ Female

5) Enter the student's home postal code with no spaces (A#A#A#):

6) Enter the student number from your local student administration system:

7) Enter the student's PEN:

Save Delete Back

## Step by Step Instructions How to use the PEN Web Application

### Menu Option # 5 - Download Files

Select option 5 'Download' from the main menu or quick menu. This option allows the user to obtain all PEN output from requests submitted to the ministry for review, or PEN files uploaded to the application. Once you click on this option you will see "PEN files available for download".

**Please note:** PEN files are only available for 10 days. If you miss this window, please contact the [PENS.Coordinator@gov.bc.ca](mailto:PENS.Coordinator@gov.bc.ca) to have your files reposted.

- In order to upload the (.ids) file into your student administration system, you will have to save it onto your hard drive. Details below!
- To view the (.pdf) file you simply click on "[XXXXXXXXX.PDF](#)" and the file should open in Adobe Reader to display your PEN activity. Details below!
- DMG file (Districts Only): This file reports the student demographics as contained in the Ministry PEN system. Some districts have the ability to load this file into their administration system and run a report of the differences in data between the district system and the ministry system.
- TXT file (PSI Only): This file provides a list of errors the ministry can not PEN without the institution providing further demographic information.



#### Quick Menu

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Review Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

### Download PEN Files

TSW-2030

#### PEN files available for download:

Only files generated in the last 10 days will be displayed. If you have missed this window, please contact [PENS.Coordinator@gov.bc.ca](mailto:PENS.Coordinator@gov.bc.ca) and include your school code in the body of the email to have your files reposted.

File Name	Submission	File Type	Creation Date
<a href="#">00699157.PDF</a>	M0243161	PDF	2018/03/27 10:38 PM
<a href="#">00699157.PDF</a>	M0243390	PDF	2018/03/29 1:35 AM
<a href="#">00699157.PDF</a>	M0243624	PDF	2018/03/29 10:39 PM
<a href="#">00699157.PDF</a>	M0243850	PDF	2018/03/30 10:44 PM
<a href="#">00699157.PDF</a>	M0244015	PDF	2018/04/02 10:38 PM
<a href="#">00699157.PDF</a>	M0244188	PDF	2018/04/03 11:41 PM
<a href="#">00699157.PDF</a>	M0244528	PDF	2018/04/05 1:46 AM
<a href="#">00699157.PDF</a>	M0244924	PDF	2018/04/06 8:35 AM

#### PDF File:

This report summarizes the PEN activity of all the students submitted in your latest PEN request. Please review this report and update your Student Administration System and files before your next submission.

Note: PDF files require [Acrobat Reader](#) to view or print.

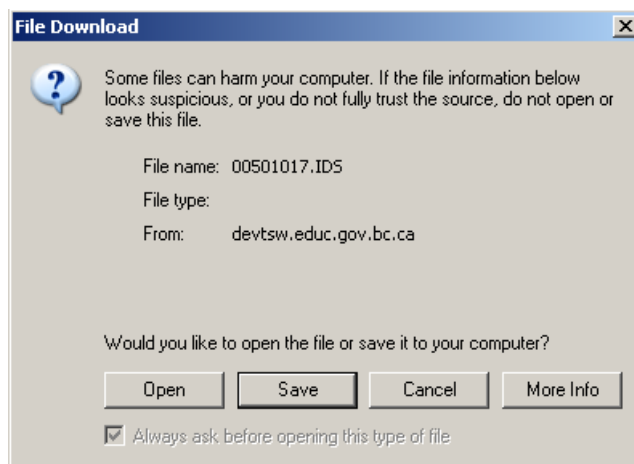
#### IDS File:

This file is intended to be uploaded into your student administration system. Please save this file to your local computer and run the import PEN request file from your student administration system.

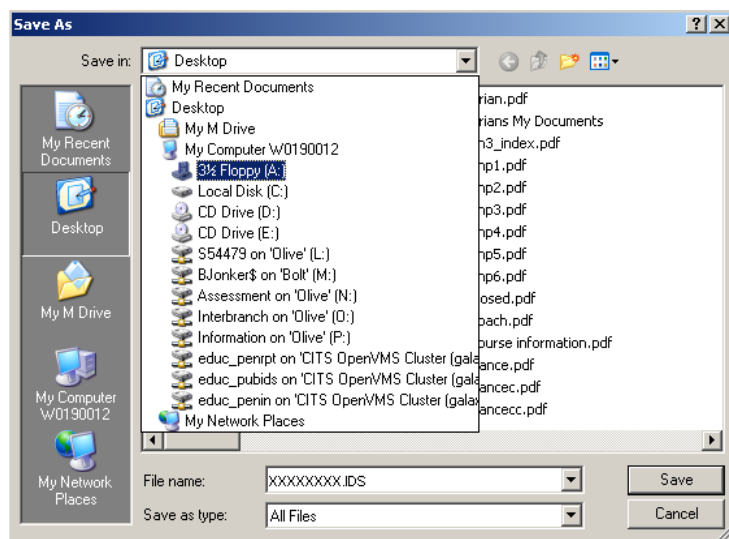
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### Saving your IDS File

Select the IDS file that you want to save by clicking on your school code .ids, in the example above I would click on 00501017.IDS. The following dialog box will appear:



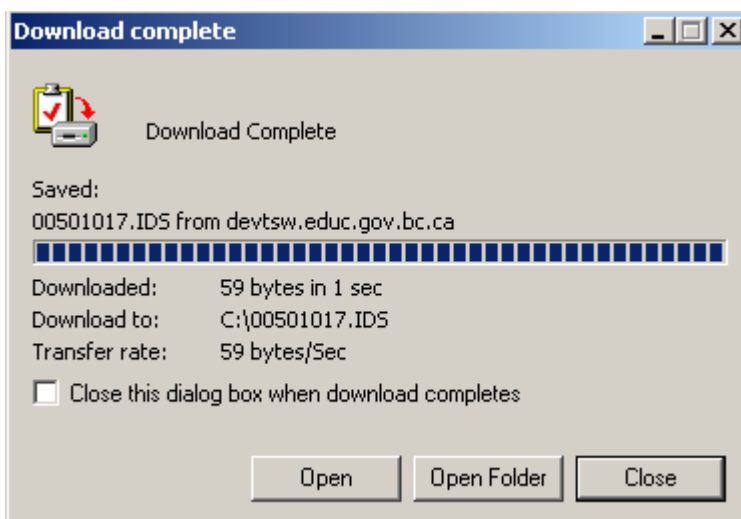
Select 'Save' from this dialog. **DO NOT OPEN THE FILE!** Once you have clicked the 'Save' button the following 'Save As' dialog box will appear:



Save this file to a location on your computer where you will be able to find it. Once you have selected your location, click the 'Save' button, at which time the file will be placed in the location you have specified and the following dialog will appear:



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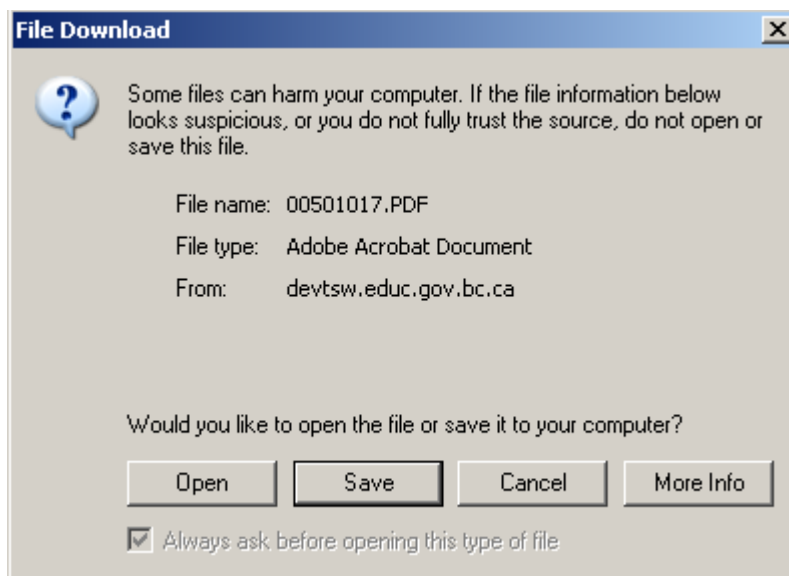


Please select the close button, DO NOT OPEN THIS FILE!

Now you can upload this file to your Student Administration System using its import function.

### Viewing your PDF File

Select the PDF file that you want to save by clicking on your school code .pdf, in the example above I would click on 00501017.PDF. The following dialog box will appear:



Select the 'Open' option from this dialog. This will open the PDF file in Adobe Reader for you to view and print. If you do not have Adobe Reader, it is a freeware application and available from [www.adobe.com](http://www.adobe.com)



### Menu Option # 6 – Change password

The ministry recommends passwords be changed every 90 days and are set to auto-expire.

The screenshot shows the EdAccess web application interface. At the top, there is a navigation bar with 'Ministry Home' and 'Government of British Columbia' links. Below this is a banner for 'EdAccess' and 'Ministry of Education'. A 'Quick Menu' section contains links: 'Update Contact', 'Submit Requests', 'Upload Requests', 'Download', 'Password', 'Reminder', and 'Logoff'. The 'Change Password' section is highlighted. It contains instructions: 'Password must be a minimum of 6 characters and contain at least one number or special character. Note that passwords are case sensitive. It is required that you change your password every 90 days.' Below the instructions are three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. There are 'Submit' and 'Cancel' buttons at the bottom of the form. A footer bar contains links: 'Top', 'Copyright', 'Disclaimer', 'Privacy', and 'Feedback'.

• Ministry Home • Government of British Columbia

**EdAccess** Ministry of Education

**Quick Menu**

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

**Change Password**

Password must be a minimum of 6 characters and contain at least one number or special character. Note that passwords are case sensitive. It is required that you change your password every 90 days.

Old Password:

New Password:

Confirm New Password:

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### Menu Option # 7 – Change reminder question

The answer to this question is intended to provide you access to the system in the event you forget your password. Please choose a question to which you will remember the answer.

The screenshot shows the EdAccess web application interface. At the top, there is a navigation bar with 'Ministry Home' and 'Government of British Columbia' links. Below this is a banner for 'EdAccess' and 'Ministry of Education'. A 'Quick Menu' section contains links: 'Update Contact', 'Submit Requests', 'Upload Requests', 'Download', 'Password', 'Reminder', and 'Logoff'. The 'Change Reminder' section is highlighted. It contains a 'New Reminder Question:' label followed by a dropdown menu showing 'What is your father's middle name?'. Below this is a 'New Reminder Answer:' label followed by a text input field. There are 'Submit' and 'Cancel' buttons at the bottom of the form. A footer bar contains links: 'Top', 'Copyright', 'Disclaimer', 'Privacy', and 'Feedback'.

• Ministry Home • Government of British Columbia

**EdAccess** Ministry of Education

**Quick Menu**

[Update Contact](#) | [Submit Requests](#) | [Upload Requests](#) | [Download](#) | [Password](#) | [Reminder](#) | [Logoff](#)

**Change Reminder**

New Reminder Question:

New Reminder Answer:

•Top •Copyright •Disclaimer •Privacy •Feedback

Menu Option # 8 – Logoff

