



Step by Step Instructions

How to use the PEN Web Application

Last Updated: August 11, 2008

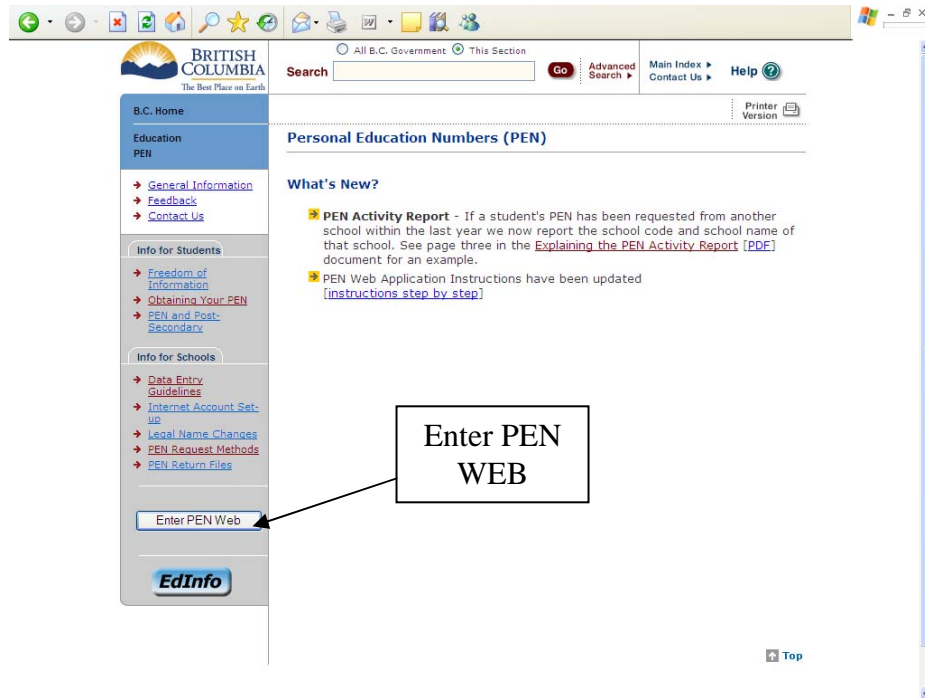
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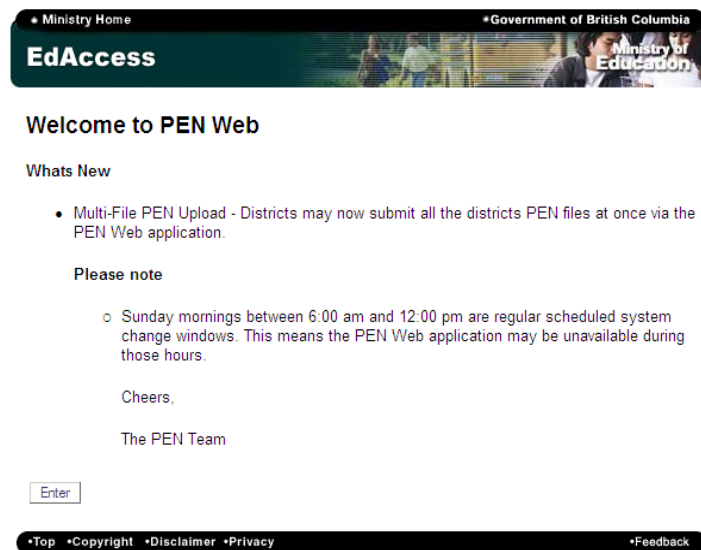
Step by Step Instructions How to use the PEN Web Application

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. 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.



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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 and include the following: name, school code, school phone number and principal's name.

The screenshot shows the top navigation bar with 'Ministry Home' and 'Government of British Columbia' links. Below is the 'EdAccess' logo and a banner image for the 'Ministry of Education'. The main heading is 'Secure PEN Web Access'. The form area is titled 'Principal & District Logon' and contains two input fields: 'Principal or District ID:' and 'Password:'. A 'Logon' button is positioned below the password field. A link for 'Forgot your password? Click here.' is located at the bottom of the form. The footer contains links for 'Top', 'Copyright', 'Disclaimer', 'Privacy', and 'Feedback'.

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.

The screenshot shows the top navigation bar with 'Ministry Home' and 'Government of British Columbia' links. Below is the 'EdAccess' logo and a banner image for the 'Ministry of Education'. The main heading is 'Change Password'. The text below the heading reads: '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.' The form contains four input fields: 'New Password:', 'Confirm New Password:', 'Password Reminder Question:' (with a dropdown menu showing 'What is your mother's maiden name?'), and 'Password Reminder Answer:'. A 'Logon' button is located at the bottom of the form. The footer contains links for 'Top', 'Copyright', 'Disclaimer', 'Privacy', and 'Feedback'.

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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: ← Your contact information will appear here
School:

Menu

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

•Top •Copyright •Disclaimer •Privacy •Feedback

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](#)

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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 for 'Update Contact', 'Submit Requests', 'Upload Requests', 'Review Requests', 'Download', 'Password', 'Reminder', and 'Logoff'. The main content area is titled 'Update Contact Information' and contains a form with the following fields: 'E-Mail:' with a text input field, 'School Name:' with a text input field, 'Contact Person:' with a text input field, and 'Fax:' with three separate input fields for the number. Below these fields is a label 'Ministry School Code (8 digits):' and two buttons, 'Save' and 'Cancel'. At the bottom of the page, there is a footer with links for 'Top', 'Copyright', 'Disclaimer', 'Privacy', and 'Feedback'.

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 than 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.

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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

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:

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.

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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:

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

The screenshot shows 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 with the Ministry of Education logo. A Quick Menu section contains links for Update Contact, Submit Requests, Upload Requests, Review Requests, Download, Password, Reminder, and Logoff. The main content area features a table of student records with columns for Local ID, Legal Name, Usual Name, Gender, Date of Birth, and Error Count. There are buttons for 'Delete all Selected', 'Submit to Ministry', and 'Show Possible Errors'. At the bottom, there are links for 'Select ALL', 'Deselect ALL', and 'Back', along with a footer containing 'Top', 'Copyright', 'Disclaimer', 'Privacy', and 'Feedback'.

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 type="checkbox"/> 1234	SMITH	JOHN	HENRY				M	20030821	0	Delete
<input type="checkbox"/> 12345	SMITH	CHRISTINA	MARIE				F	19700821	1	Delete
<input type="checkbox"/> 123456	NULL	STUDENT	TEST				M	20030506	2	Delete

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.

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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.

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 the "EdAccess" logo and "Ministry of Education" text. A "Quick Menu" section contains links for "Update Contact", "Submit Requests", "Upload Requests", "Review Requests", "Download", "Password", "Reminder", and "Logout". A red circle highlights an error message: "StrongStart school students must be between the age of 0-6". Below the error message is a form with seven numbered steps 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 of the form are "Save", "Delete", and "Back" buttons.

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 navigation bar and logo are the same as in the previous screenshot. The "Quick Menu" section contains the same links. A message is displayed:

- 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 of the page is a footer with links for "Top", "Copyright", "Disclaimer", "Privacy", and "Feedback".

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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.

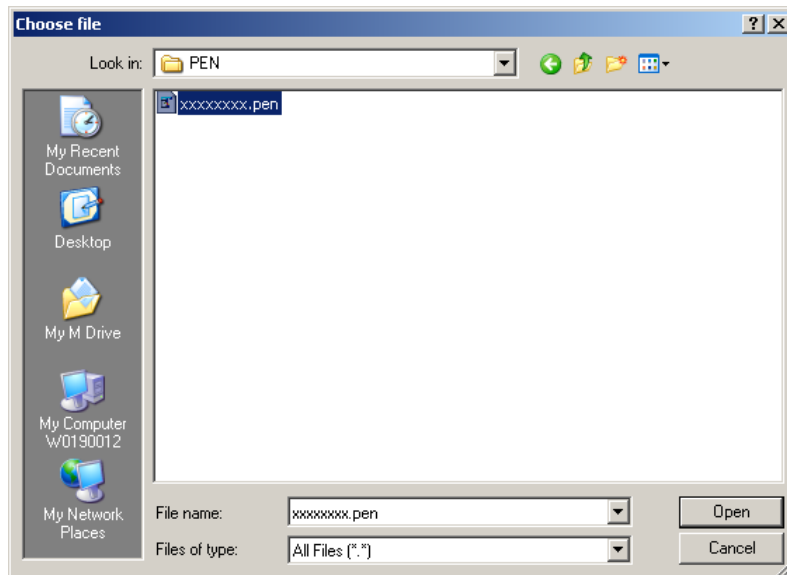
Menu Option # 3 - Upload Pen Requests

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.

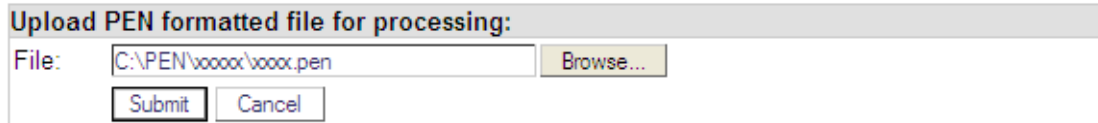
The screenshot shows the EdAccess web application interface. At the top, there is a navigation bar with "Ministry Home" on the left and "Government of British Columbia" on the right. Below this is a banner for "EdAccess" with the "Ministry of Education" logo. A "Quick Menu" section contains links for "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:" with a "File:" label, a text input field, a "Browse..." button, and "Submit" and "Cancel" buttons. At the bottom, there is a footer with links for "Top", "Copyright", "Disclaimer", "Privacy", and "Feedback". The text "TSW-2034" is visible in the bottom right corner 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:



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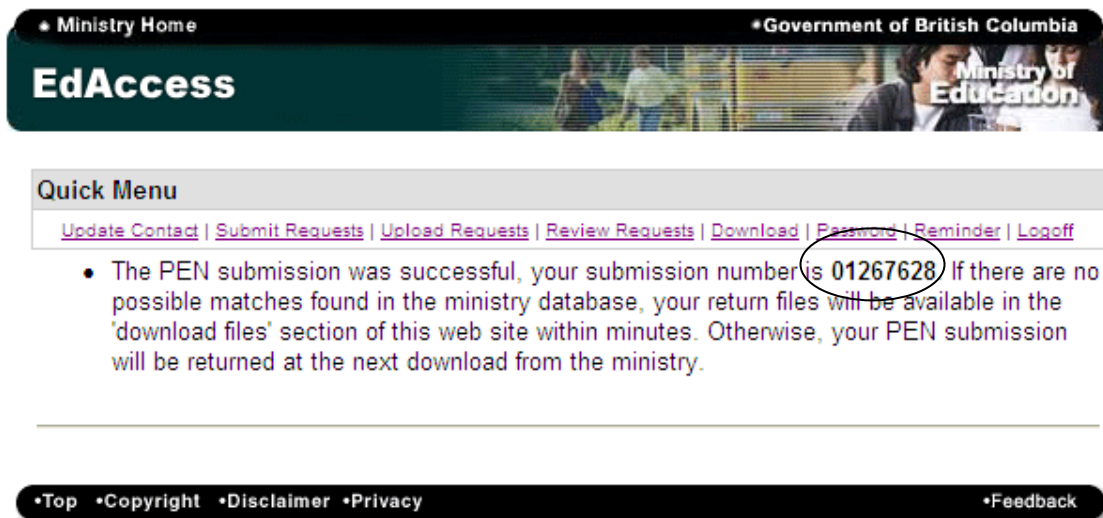
Select your file and click the 'Open' button in the dialog box. This will insert the path of your file into the web upload form allowing the application to upload your file. Once you select 'open', the web page displays as indicated below, notice it has copied the path of your file into the form.



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

Ministry of Education

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.

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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 the "EdAccess" logo and a "Ministry of Education" banner. A "Quick Menu" section contains links for "Update Contact", "Submit Requests", "Upload Requests", "Review Requests", "Download", "Password", "Reminder", and "Logout". The user ID "TSW-2043" is displayed.

The main content area features a table with columns: Local ID, Legal Surname, Legal Given Name, Legal Middle Name, Usual Surname, Usual Given Name, Usual Middle Name, Gender, Date of Birth, and Error Count. The table contains three rows of student data:

Local ID	Legal Surname	Legal Given Name	Legal Middle Name	Usual Surname	Usual Given Name	Usual Middle Name	Gender	Date of Birth	Error Count	
1234	SMITH	JOHN	HENRY				M	20030821	0	Delete
12345	SMITH	CHRISTINA	MARIE				F	19700821	1	Delete
123456	NULL	STUDENT	TEST				M	20030506	2	Delete

Below the table are buttons for "Select ALL", "Deselect ALL", and "Back". At the bottom, there is a navigation bar with links for "Top", "Copyright", "Disclaimer", "Privacy", and "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.

The screenshot shows the EdAccess web application interface with a detailed data entry form. At the top, there is a navigation bar with "Ministry Home" and "Government of British Columbia" links. Below this is the "EdAccess" logo and a "Ministry of Education" banner. A "Quick Menu" section contains links for "Update Contact", "Submit Requests", "Upload Requests", "Review Requests", "Download", "Password", "Reminder", and "Logout". The user ID "TSW-2040" is displayed.

The main content area features a list of items, with the first item circled: "StrongStart school students must be between the age of 0-6". Below this is a form with the following steps:

- 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.
- Enter the student's name as they prefer to be called (if different):
Surname: _____, First Name: _____, Middle Name: _____
- Enter the student's birth date as YYYYMMDD (4 digit year, no spaces or slashes):
19700821
- Enter the appropriate gender for the student:
 Male Female
- Enter the student's home postal code with no spaces (A#A#A#):
V8P2R3
- Enter the student number from your local student administration system:
12345
- Enter the student's PEN:

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

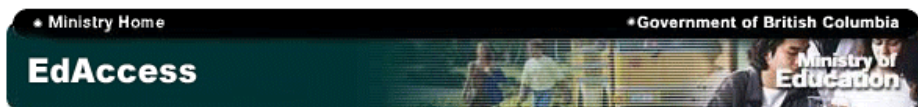
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Menu Option # 5 - Download Files

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 5 days. If you miss this window, please contact the 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](#)

PEN Download Files

TSW-2030

PEN files available for download:

Only files generated in the last 5 days will be displayed. If you have missed this window, please contact PENS.Coordinator@gov.bc.ca to have your files reposted.

File Name	Submission	File Type	Creation Date
00625029_IDS	01265602	IDS	2008/08/08 10:03 AM
00625029_PDF	01265602	PDF	2008/08/08 10:03 AM
00625029_IDS	01267629	IDS	2008/08/11 3:10 PM
00625029_PDF	01267629	PDF	2008/08/11 3:10 PM
00625029_IDS	01267628	IDS	2008/08/12 10:30 AM
00625029_PDF	01267628	PDF	2008/08/12 10:30 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.

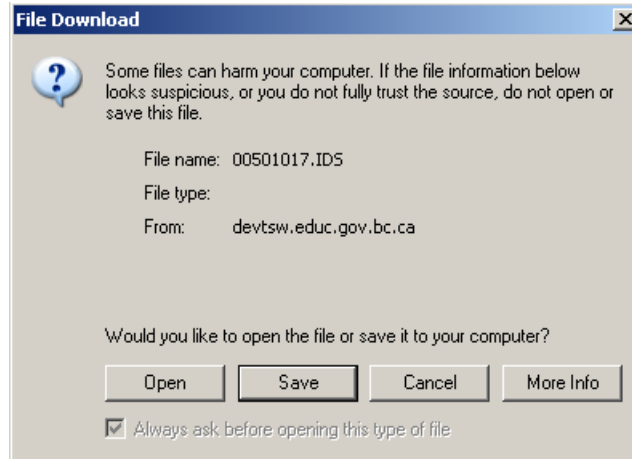
IDS File:

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

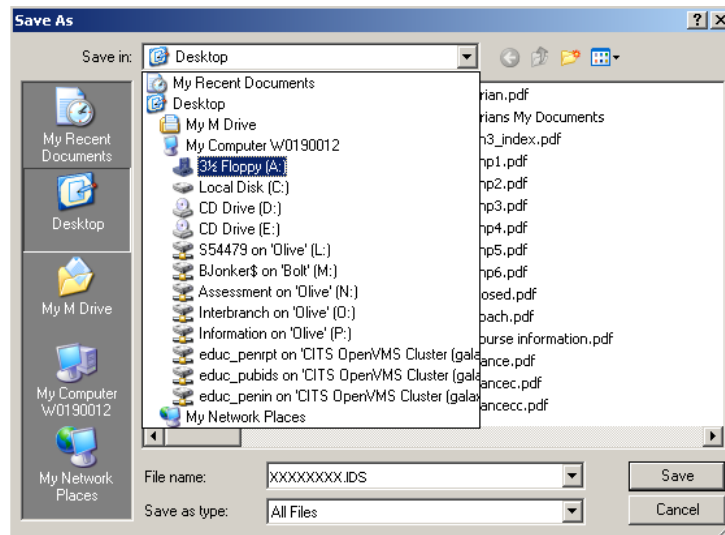
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Saving your IDS File

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:

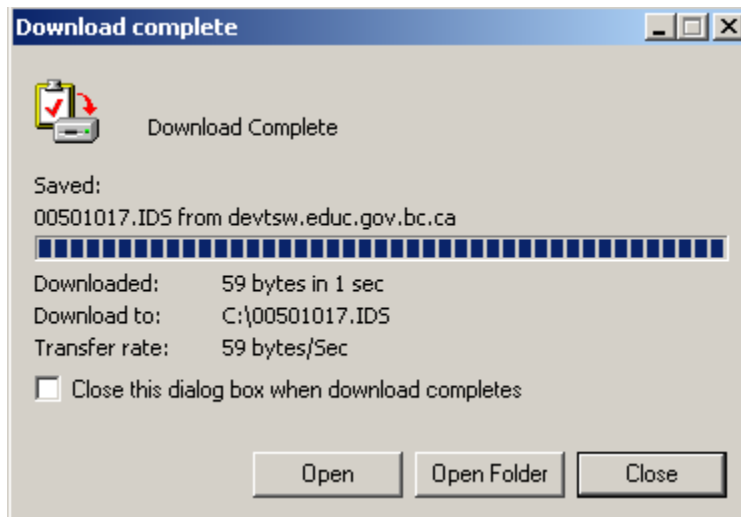


Select 'Save' from this dialog. **DO NOT OPEN THE FILE!** Once you have clicked the 'Save' button the following 'Save As' dialog box will appear:



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

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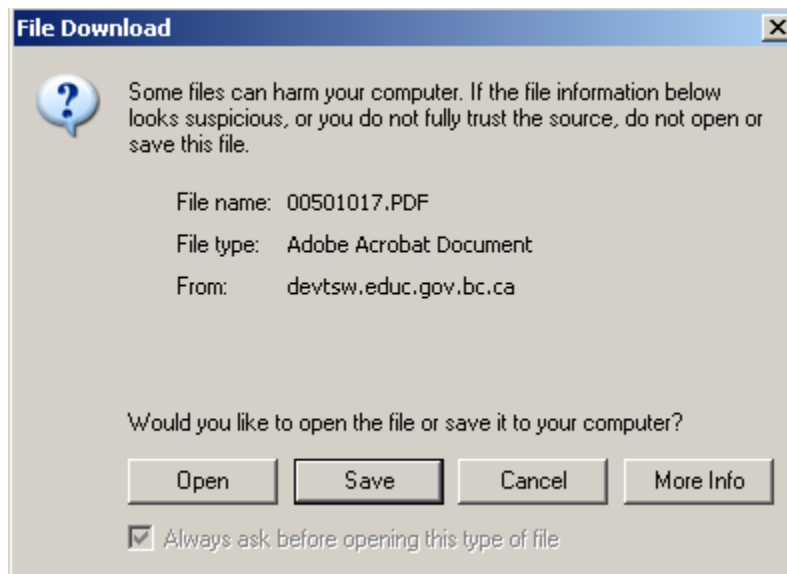


Please select the close button, DO NOT OPEN THIS FILE!

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

Menu Option # 6 – Change password

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

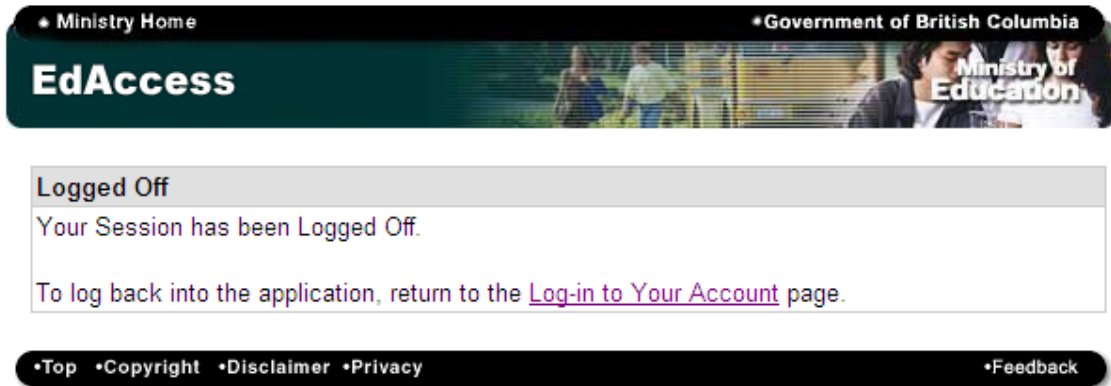
The screenshot shows the EdAccess website header with 'Ministry Home' and 'Government of British Columbia' links. The main banner features the 'EdAccess' logo and 'Ministry of Education' text. Below the banner is a 'Quick Menu' with links: [Update Contact](#), [Submit Requests](#), [Upload Requests](#), [Download](#), [Password](#), [Reminder](#), and [Logoff](#). The 'Change Password' section contains the following text: '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 this text are three input fields: 'Old Password:', 'New Password:', and 'Confirm New Password:'. At the bottom of the form are 'Submit' and 'Cancel' buttons. A footer bar contains links: [Top](#), [Copyright](#), [Disclaimer](#), [Privacy](#), and [Feedback](#).

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 website header with 'Ministry Home' and 'Government of British Columbia' links. The main banner features the 'EdAccess' logo and 'Ministry of Education' text. Below the banner is a 'Quick Menu' with links: [Update Contact](#), [Submit Requests](#), [Upload Requests](#), [Download](#), [Password](#), [Reminder](#), and [Logoff](#). The 'Change Reminder' section contains the following text: 'New Reminder Question:' followed by a dropdown menu showing 'What is your father's middle name?'. Below this is a text input field for 'New Reminder Answer:'. At the bottom of the form are 'Submit' and 'Cancel' buttons. A footer bar contains links: [Top](#), [Copyright](#), [Disclaimer](#), [Privacy](#), and [Feedback](#).

Menu Option # 8 – Logoff



The screenshot shows the EdAccess web application interface. At the top, there is a dark green header bar with "Ministry Home" on the left and "Government of British Columbia" on the right. Below this is a banner image with the "EdAccess" logo on the left and "Ministry of Education" on the right. The main content area has a light gray background and contains the following text:

Logged Off
Your Session has been Logged Off.
To log back into the application, return to the [Log-in to Your Account](#) page.

At the bottom, there is a dark green footer bar with "Top", "Copyright", "Disclaimer", and "Privacy" on the left, and "Feedback" on the right.