



Take 2

Checklist for
Successfully Completing the Annual Completion Single
Data Return to the Ministry of Education

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Version Control

Version	Date	Notes	Author
4.1	26/05/03	Revised for June 2003 SDR	Mike Balk and Richard Hamilton-Williams
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JUNE QUALIFICATION COMPLETION RETURN

Change from 2004

The June return in 2005 includes only the qualification completion file. The course completion is now returned each four months with the standard SDR.

Which students are included?

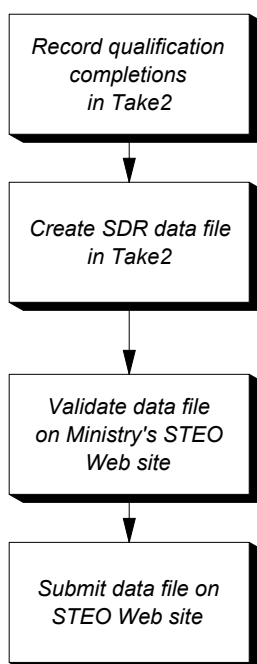
The students included in the qualification completion return are those who have completed a formally recognised qualification. The determination of what is a “formally recognised qualification” is based on what is called a “Award Category”. For the appropriate students to be selected by *Take2* you must make sure that you set a valid award category on the *Curriculum* form in *Take2* for every prescribed qualification.

The screenshot displays the 'Curriculum - Qualification' window. It features a tabbed interface with 'Qualification' selected. The main area is divided into a list of qualifications on the left and a detailed form on the right. The list shows '01RT1: National Certificate in Road Transport' selected. The form on the right contains the following fields:

- ID: 6 Prescribed # 1 of 1 Record Updated: 27/05/2005
- Internal Code: 01RT1 Tutor: [dropdown]
- Title: National Certificate in Road Transport
- Manager: [text field]
- Qualification Code: NC0680
- Approved By: [text field]
- First Approved: [text field] Reg: 0
- Status: A Award Category: 36
- EFTS Value: 1.0000 Default Funding: 01
- Main Subject: [dropdown]
- Branch: [dropdown]
- Approved To: [text field]
- Approved From: [text field]
- Weeks: 0

A red arrow points to the 'Award Category' field, which is set to '36'. At the bottom left, there is a 'Sort by:' section with radio buttons for 'Code' (selected) and 'Title'.

Process overview The June return is much simpler than the April, August and December returns. There are essentially just four steps.



Record qualification completions in Take2

Section 9.2 of the *Take2* User Manual explains how to record qualification completions. Essentially what you are doing is placing a tick in a field called *Complete* which shows that the student has completed the academic requirements for a formal qualification.

You also enter a date in the *Date Completed* field to show when the qualification was completed.

Take2 uses only the two bits of information – the *Complete* field and the *Date Completed* field – when making the qualification completion return. The other fields on the form on which you record qualification completions have no effect on the SDR. However, we also recommend that you enter a date in the *F(inish) Studies Date* field because, although this is not required for the qualification completion return, *Take2* uses it when generating information used for the statement of service performance/profiles process.

Note – when you make a qualification completion return you have the option of including all completions in either:

- The period 1 April of the preceding year to 31 March of the return year. So, for example, if you made the qualification completion return in June 2004, only qualification completions with a *Date Completed* value from 01/04/2003 to 31/03/2004 would be included.
- The preceding academic year which, we have assumed, means 1 January to 31 December. So, for example, if you made the qualification completion return in June 2004, only qualification completions with a *Date Completed* value from 01/01/2003 to 31/12/2003 would be included.

It is our view that using the second of these two options is now preferable

*Create
qualification
completion file
in Take2*

because it aligns your SDR return with your statement of service performance/profile.

Go to the *SDR* form: Administration Module – *External Reporting* > *Ministry Of Education* > *Single Data Return*.

1. **Step 1** – Select *Qualification Completion*.
2. **Step 2** – Enter the return year and extraction date (you can only use June1). Select a qualification completion period. We recommend using “Academic Year”.
3. **Step 3** – Click *Validate*. *Take2* undertakes its own validation process and will notify you if there are any obvious deficiencies in your data. For example, if you have entered a student without a gender, the *Take2* validation will tell you.
4. **Step 4** – Once you are satisfied with the validation you extract the data files by clicking *Extract* – this saves the data file to your hard disk ready for testing with the Ministry’s validation program. It is suggested that you create a new folder for each SDR. For example for the June 2005 SDR you might create a folder called “C:\Take2\SDR\2005-06”.
Save the data file into this folder, giving the extracted file an easily recognisable name; the default suggested by *Take2* is “Qc.txt”.
5. **Step 5** – Once you have run the extraction process in *Take2*, you will find that an audit report buttons become available on the *SDR* form. Click this button to produce a report listing precisely what data you are returning to the Ministry.
Have a look at the report. Does the data look right? If the report shows that you are sending data for 20 students and you know that you have enrolled 200 students, something is wrong. **Fix it before you go any further!**

Validate on STEO Web Site

The data file you have created using *Take2* may be perfect but, until you have subjected it to validation by the Ministry's validation process you cannot submit it to the Ministry.

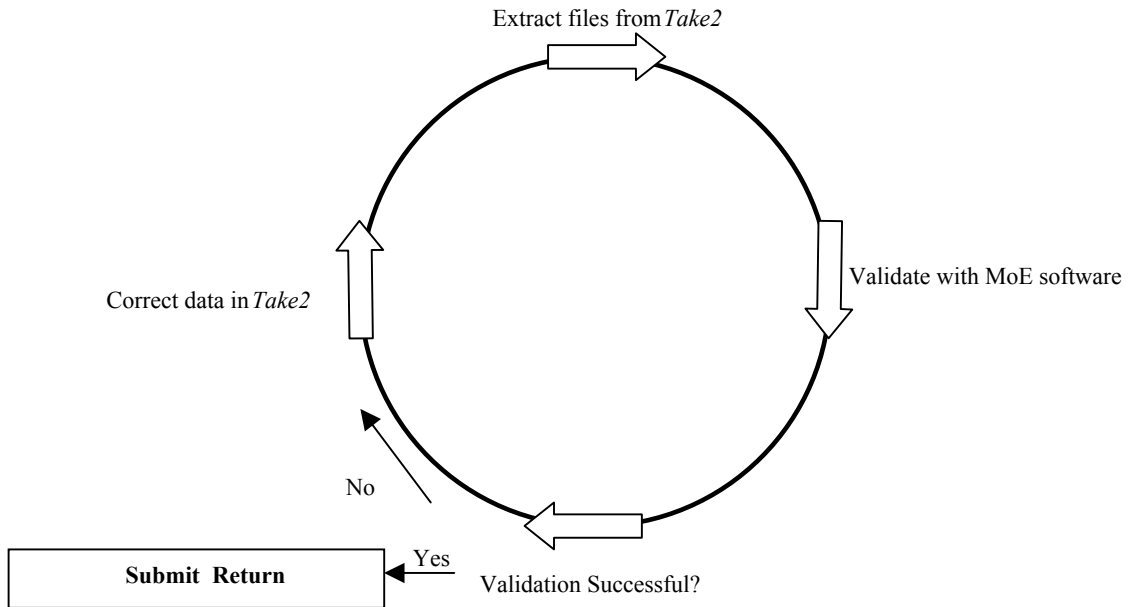
Go to the Ministry's STEO Web site and login to the secure site. Follow the validation process on the site.

The Ministry makes documentation describing this process available on the STEO Web site. Note that the qualification completion return made in June 2005 should have a return month of December 2004 on the STEO site.

Validation outcome

Once the validation has run, and if you are very lucky, you will have no errors or warnings. It is more likely though that you will have at least a few to sort out. The errors and warnings are summarised for you and, by selecting a specific item in the list on the *Error Summary*, you can generate a report that shows the detailed information you need to go back and correct your source data in *Take2*.

Once you have corrected data in *Take2* you must run the *Take2* extraction process again to create a new data file before using the Ministry's validation software once more.



At the end of this checklist is a table of SDR file and fields, which shows how they map to fields on *Take2* forms. If, for example, you get an error message from the validation program telling you that “QUAL is not valid on Qualification Register” for the Course Enrolment file, then the Data Return Mappings list tells you that you need to look at the Qualification Code field on the *Course Tab* of the *Curriculum* form in *Take2*.

*Submit to
Ministry*

Don't forget to click the *Submit* link on the STEO web site!

***CHECK YOUR
RETURN***

It cannot be emphasised enough that you should check your summary before signing it and sending it to the Ministry. If the summary shows, for example, that you have a total of 343 qualification completions, but you know that you should have over 400, then you know there is a problem which must be fixed before you send back the return.

Field No	Field Name	Field Title	Take2 Location Form->Field
Qualification Completion File			
4.1	INSTIT	Provider Code	Site Details->Site MoE Number
4.2	ID	Student Identification Code	Students->ID (the value is assigned by the system and cannot be changed)
4.3	GENDER	Gender	Students->Gender
4.4	DOB	Date of Birth	Students->Date of Birth
4.5	ETHNIC	Ethnicity	Students->Ethnicity (all three fields)
4.6	CITIZEN	Country of Citizenship/ Residential Status	Students->Citizenship
4.7	S_SCHOOL	Last Secondary School Attended	Students->School
4.8	Y_SCHOOL	Last Year at Secondary School	Students->Last Year
4.9	SEC_QUAL	Highest Secondary School Qualification	Students->Sec. Award
4.10	ASSIST	Form of Assistance for International students	Students->Assistance
4.11	QUAL	Qualification Code	Prescribed Programme-> Qualification Code
4.12	Removed	Padded blanks	Single space
4.13	MAIN_1	Main Subject 1	Prescribed Programme->Main Subject
4.14	MAIN_2	Main Subject 2	N/a
4.15	MAIN_3	Main Subject 3	N/a
4.16	IWI	Iwi Code	Students->Iwi
4.17	NSN	National Student Number	Students->NSI Number