

PERIODIC RETURNS (April, August, December and Indicative)

Design your enrolment form

The Ministry of Education and TEC define precisely what data they want to collect through the SDR. Much of this data comes from your students. You gather the data from the students on an enrolment form. Make sure that your enrolment form collects all required data from students. A generic enrolment form is available from the Ministry of Education's STEO website in the [Guides and Forms](#) section.

A similar form is also available from the Take2 Web site. Note that the form on the Take2 website has been tuned to the requirements of Take2 users, in particular by making the sequence of questions on the form fit the sequence of fields on the Take2 Student screen. If you don't use this form (sometimes known as the "Happy Days" form) as the basis of your own form, you might at least like to check your own form against it.

Process enrolments

You must process student enrolments in a manner that is consistent with TEC's requirements. Essentially this means ensuring:

- The identity and residency status of students is established and recorded.
- Students supply all required data.
- Students are eligible to study in their chosen programme of study.
- Students pay (or arrange to have paid) tuition fees.
- There is a clear record of precisely what qualification(s) and course(s) the student is undertaking.

Refer to the [Fund Finder](#) on the TEC web site for further details for each funding source.

The onus is on you to ensure that enrolments are correctly processed and that you collect and keep all necessary documentation. If enrolments are not correctly processed, and there are inadequate records, you may not be entitled to TEC funding and your students may not be entitled to Student Loans/Student Allowances.

If you process enrolments correctly you will have the paperwork that will supply the data you need to generate an enrolment in Take2.

Enter student data in Take2

You should be able to enter details of students in Take2 from their enrolment forms. Depending on various factors the amount of data required for each student varies – see the Ministry's publication, the *Single Data Return Manual*, for more information. This manual is updated each year.

Obtain NSN for students

From 2003 an NSN (National Student Index Number) must be included in the SDR for every student. So you need to use the NSI Web interface, the NSI XML interface or, if you use the SQL Server edition of Take2, the NSI Batch interface, to acquire NSNs for all students. Furthermore, what are called "Type D" students must be verified on the NSI for them to be included in the SDR without causing a validation error. Verification means that someone has verified the identity and residency status of the student.

Ensure Take2 curriculum matches Qualification and Course Registers

When you use Take2 to create data files for the SDR, the files contain Qualification Register codes for qualifications and Course Codes for courses. It is essential that the codes that Take2 uses when it creates the data files are exactly the same as the codes that TEC is expecting.

Why? Because the Ministry's validation software compares the codes in the SDR data files against the codes in TEC's Qualification and Course Registers. If the codes don't match, an error will be returned and you will not be able to submit the data files to the Ministry.

Not only are codes matched, so too are other things like funding categories and classifications and course factors. So, make sure that what you have entered into TEC's Qualification and Course Registers is what you have entered in Take2.

The screenshot displays two overlapping windows from the TEC system. The background window shows course details for 'Painting - Fine Arts' (DCC10046). Fields include: Unit Standard Number (2001), Funding Category (A1), NZSCED (100305), Credit Value/Local Points (0.05), Teaching Weeks (4), and Stage (N). The foreground window shows registration details for the same course, including: Qualification Code (PC9011), NZSCED (100305), NZQA Cr Value (6), NZQA Level (4), Internet (1), and Tuition Fee (\$600). Buttons for 'Save', 'Copy', 'Edit', 'Delete', 'Print', and 'Offer One' are visible at the top of the foreground window.

Ensure delivery sites are entered via the TEC Web site and in Take2

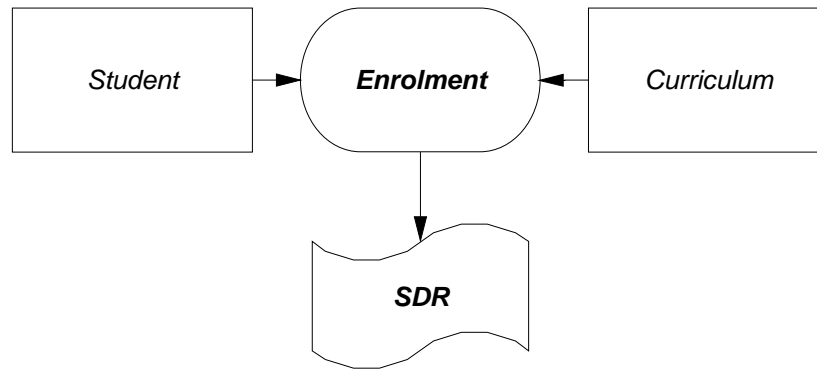
Course delivery site codes are required to classify every enrolment. See the *Single Data Return Manual* for more information on site codes, each of which must be registered on the secure TEC web site. In Take2 site codes are entered on the *External Lookups* form (Administration Module). You assign site codes on the *Enrolment Defaults* form when creating an enrolment. Note: From 2006 codes must be 2 digit numeric codes.

Create enrolments in Take2

Once your curriculum is in order and you have entered a student's details you can go ahead and create that student's enrolment in Take2.

In order for a student to be reported as part of the SDR the student must be enrolled in a qualification and one or more courses, and one of the courses must be in the Course Register.

If a student's details have been added to Take2 but no enrolment has been created, then that student will not be reported as part of the SDR.



Record course completion codes

Course completion codes have to be returned for course enrolments of type D students who are not funded by MSD or ITO Off-Job funding.

In Take2 whenever a course enrolment record is created a default course completion code of “1 – Still to complete” is assigned to the course enrolment.

If the student completes the course successfully before or by their planned finish date you should enter “2 – Completed successfully” as the course completion code; i.e. change “1” to “2”. Note, if you mark a course as “Complete” on a Take2 “*Outcomes*” form code 2 is inserted automatically.

If the student withdraws before they planned finish date you should enter “4 – Did not complete” as the course completion code. Note, if you process the withdrawal correctly on the *Enrolment Details* form in Take2 a code 4 is inserted automatically.

If the student neither withdrew nor successfully completed their course, but has been assessed and not given an extension by their planned finish date you should enter “3 – Completed unsuccessfully” as the course completion code.

Codes 2, 3, and 4 codes are “final” codes. They should never change once allocated.

If the student still has some kind of practicum to complete at their planned finish date you should enter “5 – Practicum to complete” as the course completion code.

If the student has been given an extension beyond their planned finish date, or their outcome is held up in some other way (for example it is under moderation) you should enter a code of 0, 6, or 7. See the *SDR Manual* for more information on these codes.

Codes 0, 1, 5, 6, and 7 are “interim” codes and must, ultimately, be changed to 2, 3, or 4 when a final outcome is known. Take2 has an in-built “mapping” mechanism which will correctly assign these codes if you record the correct data.

Recording Qualification Completions in Take2

- The students included in the return are those who have successfully completed a qualification during the current calendar year.
- The easiest way to record completions in Take2 is on the *Qualification Outcomes* form.
- In the Take2 Main Menu click *Student Management, Outcomes* and then *Qualification*.



- Click on the *Qualification* sub-tab on the *Filter* tab and select the qualification to record completions against.
- Click *Display*.
- The *Qualification Outcomes* form will be displayed with a list of students.
- Place a tick in the *Complete* field for each applicable student. By doing so you have indicated that the student has completed the academic requirements for a formal qualification.

PerID	Name	Complete	Date Completed	F Studies Date	Status	Notes
10151	Aardvaark, Brent	<input type="checkbox"/>		30/11/2006	C	
10147	Aardvaark, Daniel	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10148	Aardvaark, Emma Teresa	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10144	Aardvaark, Francis	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10146	Aardvaark, John-Paul	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10154	Aardvaark, Jonathan	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10145	Aardvaark, Paul	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10150	Aardvaark, Roestam	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10153	Aardvaark, Shaun Grahah	<input type="checkbox"/>		07/07/2006	W	
10149	Aardvaark, Steven	<input checked="" type="checkbox"/>	30/11/2006	30/11/2006	R	
10152	Aardvaark, Taylor Michae	<input type="checkbox"/>			C	

- Enter a date in the *Date Completed* field to show when the qualification was completed.
- It is highly recommended 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 various reports, including graduate outcomes. The absence of a value in *F Studies Date* indicates the student is still current.
- Once you have recorded all your completions you can extract the SDR file from the *SDR* form in the Administration Module.

Please note that your April and August SDRs may legitimately not include any qualification completions and Take2 will let you know if this is the case. Nevertheless a qualification completion file (containing no records) is still created in order to meet the requirements of the Ministry's STEO validation process.

Process NSI change notifications

Change notification files contain NSI student records, which have been changed on the NSI by your organisation or some other tertiary provider. You download these files from the NSI Web site and can process them with a function in the Take2 Administration Module - *System Management - NSI Housekeeping - Import NSI Change Notifications*.

The most important reason why you should process outstanding change notifications prior to the SDR is because if two NSI records have been merged, and the merge affects one of your students you may have a student in Take2 who does not have a master NSN and therefore that student will cause an error in the SDR validation process.

Create SDR data files in Take2

The full set SDR data files are the Course Register, Student, Course Completion, Qualification completion and Course Enrolment files. They are required for the April, August and December returns.

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

Step 1 - Enter a return year and select the extraction date. Leave the *Use Cut-Off* field ticked.¹

Step 2 – Select *Perform Full SDR*.

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.

Step 4 – Once you are satisfied with the validation you extract the data files by clicking *Extract* – this saves the data files 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 April 2013 SDR you might create a folder called “C:\Take2\SDR\2013-04”. Save the data files into this folder, giving each extracted file an easily recognisable name; the defaults suggested by Take2 are “Cregxxxx.TXT” for the Course Register file, “Studxxxx.TXT” for the student file, and “Courxxxx.TXT” for the course enrolment file, etc. “xxxx” is your four digit provider code. You will need to know the name and location of these files once you use the Ministry’s validation program.

Step 5 – Once you have run the extraction process in Take2, you will find that a set of audit report buttons become available on the *SDR* form. Click these buttons to produce reports listing precisely what data you are returning to the Ministry.

Have a look at these reports. Does the data look right? If the Student 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!

For the indicative return only the Course Register, Student, and Course Enrolment files are required.

¹ This field is only used in exceptional circumstances.

Ministry of Education Single Data Return Σ3

Certified as SDR compliant by the Ministry of Education. Close

SDR | Income Reports | Prior Year Course Completions | Append Files | Course Register | Disclaimer

The SDR Process in this version of Take2 applies to the 2015 year.

Step 1 - Select return year & extraction date

Return Year: 🕒 7 August

Use Cut-Off: 30 April 31 December

Step 2 - Select file(s) to extract

Perform Full SDR

Include Course Register file Include Course Completion file

Include Student file Include Qualification Completion file

Include Course Enrolment file

Step 3 - Validate Validate

Step 4 - Extract Extract

Step 5 - Audit Reports

Course Register

Student

Course Enrolment

Course Completion

Qual. Completion

We strongly recommend that you zip up the five SDR files before submitting them on the STEO web site and, indeed, this is a requirement when your Qual file contains no records. If you do zip the individual files, they must be named in accordance with the naming convention described above.