Tertiary Education Commission (TEC)

Services for Tertiary Education Organisations (STEO) Website User Guide

How to Set Up Courses and Qualifications for Youth Guarantee Reporting in the Single Data Return

Version: 3.0

Version Control

Version	Date	Changes
Version 1.1	December 2012	Original version uploaded to TEC website for tertiary education organisations' (TEOs') reference.
Version 2.0	March 2013	Updated material included in Version 2.0: Page 14 – Inclusion of information on setting up the National Certificate of Educational Achievement (NCEA) in STEO. Page 15 – Section 1- Identity now has additional advice on selecting NCEA as a local qualification. Page 22 – Updated advice on use of concurrent qualification function. Page 26 – Course Screen section now includes a note on populating course classification and funding category fields in STEO for Youth Guarantee (YG). Page 26 – Advice on disaggregation for NCEA.
Version 3.0	November 2013	Page 22 – Use of concurrent qualification function to align with policy changes in foundation education. Page 24 – Naming convention for concurrent qualifications. Page 42 – update on SLA eligibility under the heading of LET. Added Appendix Two – Qualification Decision Tree.

Table of Contents

OVERVIEW OF TEC STEO

Overview

The purpose of this section

The purpose of this section is to give the reader an overview of the TEC STEO site, primarily the 'Qualifications' and 'Courses' sections of the site.

This guide is recommended to be used as a supplement, along with support from the TEC Service Centre Helpdesk team where required.

Prerequisites

- A basic understanding of the Single Data Return (SDR) process as a result of reading the current version of the SDR manual
- Approved access to the TEC and MoE STEO websites. See ESAA information.

Related Documents

This user guide is focussed on the TEC STEO website its functions and the steps of the SDR validation/submission process associated with them. The documents, "SDR operations guidance for 2013 (Level 1 & 2, MPTT and YG)", the SDR manual, and the Guide to Completing Your SDR should also be read in conjunction with this document.

What is the TEC STEO site?

The TEC section of the STEO site is for Tertiary Education Organisations (TEOs) that submit an SDR, to register and maintain funding, qualification, course and delivery site details.

Key terms

This document makes reference to four core terms. The below gives a high level description of each of these:

A programme – is a set of courses undertaken by a student towards one or more degrees, diplomas, certificates, conjoint or double degrees, or other qualifications, and the requirements with which a student must comply to gain the qualification(s).

A qualification - is the official award given in recognition of the successful completion of a programme of study. To be eligible for funding, a qualification must be approved by the appropriate quality assurance body and the TEC.

A course – may be known as a paper, module or unit. A course is usually related to an enrolment event. For funding purposes, a course or a collection of courses form a programme of study which, if completed successfully, results in the award of a qualification.

Disaggregation – is the process by which a funded qualification and its Equivalent Full-Time Student (EFTS) value is split into courses and course EFTS factors, which are then allocated course classifications and funding categories to determine funding. In some cases TEOs must disaggregate qualifications into component courses before an external Quality Assurance Body (QAB) approves them.

There are a number of ways that TEOs can choose to disaggregate qualifications into courses. Each comes with a range of differing issues which TEOs need to be aware of before determining their preferred approach. Some examples are outlined in the following table:

Approach	Benefits	Issues
Disaggregating into multiple small courses (e.g. each unit standard = 1 course)	• Students may be encouraged by their achievements if they can see that they are passing courses frequently	• Quite a bit of initial set-up work for TEOs • Each course has to have an enrolment and a completion recorded against it for every learner. So the more courses, the more reporting required.
Disaggregating into one or two big courses containing large amounts of content	• Less initial setup work for TEOs • Less volume / effort when reporting course enrolments and results	• Students may not see their academic progress as easily • Course completion rates may be negatively impacted if just a few students fail to complete
Disaggregating into a medium number of courses (e.g. clustering groups of unit standards or other content together)	• A medium level of effort when reporting course enrolments and results • Students can still see their academic progress to some extent	• Still some initial set up work for TEOs, but at a medium level • Overall course completion rates unlikely to be as impacted by a few non completions.

TEC requires that the approach chosen be primarily driven by what is educational best practice in respect of the student's learning experiences, and which is most likely to encourage their successful achievement.

More information on disaggregation of qualifications can be found on the TEC website under the following SAC rules:

- SAC053 - disaggregation of qualifications
- SAC055 EFTS value of courses – calculating from qualifications measured in credits.
- SAC056 EFTS value of courses – calculation method
- SAC057 EFTS value of courses – calculating one year courses exceeding 120 credits

High Level Process Steps

The diagrams below provide an overview of the SDR Process for Youth Guarantee – Initial Set Up (by agency) as well as the SDR processing portion. It also provides a brief view of StudyLink's role in processing the VoS (Verification of Study). VoS is a process used by StudyLink to verify students' programme of study for student loan and allowances (SL & A) purposes. Once a student has submitted an SL or SA application, StudyLink will use the VoS to confirm the qualifications/programmes the students have enrolled in. General information

on VoS can be found on the StudyLink website. For more detailed information on the VoS process please contact StudyLink on 0508 885 885.

Please also note that this guide summarises the elements/steps that are administered by the TEC. It does not include details of the Validation and Submission portions of SDR submission. Details of the SDR submission portions of the process can be found in the Guide to Completing Your SDR on the STEO website.

High Level SDR Process for Youth Guarantee – Initial Set Up

TEO

Start → Apply to NZQA for Qualification/ Programme approval → Arrange for the appropriate systems access to the STEO websites with the Ministry of Education Contact Centre at: moe.contactcentre@minedu.govt.nz or 0800 422 599. → Set up Qualifications for SDR on TEC STEO → Disaggregate Quals into Courses → Set up Courses for SDR on TEC STEO → Set up Concurrent Quals on TEC STEO → Set up Delivery Sites on TEC STEO → Enrol students in Quals/Courses using student management system → *Verification of Study (VoS) response → End Initial Set Up. TEO delivers learning until SDR is required to be returned

NZQA

Quality Assure Qualification/ Programme → Approved by NZQA? — No / Yes

TEC

Approved by TEC? — No / Yes
Approved by TEC? — No / Yes
Approved by TEC? — No / Yes
Approved by TEC? — No / Yes

MoE

StudyLink

*StudyLink sends VoS (verification of study) to TEO
*StudyLink pays any approved allowances

Student

*Student applies for allowances on the StudyLink website.

* Optional Steps:
A student may apply for allowances on the StudyLink website. If they do, then StudyLink will require the TEO to verify the students study. If the student does not apply for allowances then the steps relating to the VoS are not required. Help for TEOs on Student Loans and Allowances is available by calling the StudyLink help line on 0508 885 885.

Legend

Boxes with green shading indicates a step in the process that the TEO must perform that is covered by the STEO website user guide – How to Set Up Courses and Qualifications for Youth Guarantee Reporting in the SDR

Boxes with red shading indicates a step in the process that the TEO must perform that is **not** covered by the STEO website user guide – How to Set Up Courses and Qualifications for Youth Guarantee Reporting in the SDR.

TEO's will need to contact the appropriate agency or download information referenced in this user guide to complete these steps
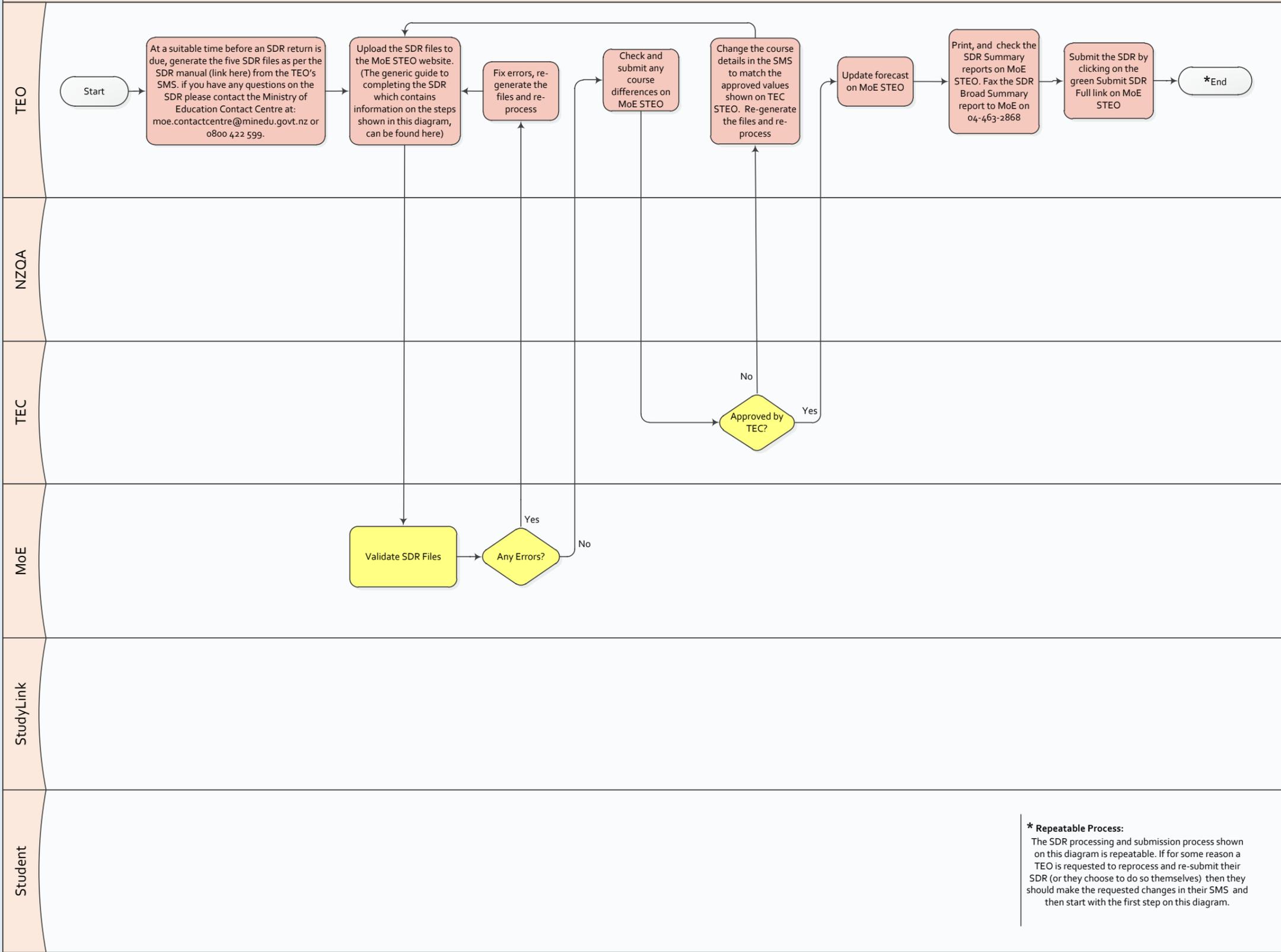
Boxes with yellow shading indicates a step in the process that is not performed by the TEO but the TEO either inputs to or uses an output from to continue the overall process. These parts of the process are **not** covered by the STEO website user guide – How to Set Up Courses and Qualifications for Youth Guarantee Reporting in the SDR

Note:
The process as shown assumes certain prerequisites have been met:

- The TEO has an SMS capable of generating SDR files or the TEO has engaged an SMS vendor to provide a suitable bureau service

- The TEO has arranged for the appropriate systems access to the STEO websites with the MoE Contact Centre .

- The TEO has either created the required NSN's or has searched the NSI for them and have followed the steps for making the NSN's active. Information on the NSI and its processes can be found on the MoE website.

8

High Level SDR Process for Youth Guarantee – SDR Processing

TEO

Start

At a suitable time before an SDR return is due, generate the five SDR files as per the SDR manual (link here) from the TEO's SMS. if you have any questions on the SDR please contact the Ministry of Education Contact Centre at: moe.contactcentre@minedu.govt.nz or 0800 422 599.

Upload the SDR files to the MoE STEO website. (The generic guide to completing the SDR which contains information on the steps shown in this diagram, can be found here)

Fix errors, re-generate the files and re-process

Check and submit any course differences on MoE STEO

Change the course details in the SMS to match the approved values shown on TEC STEO. Re-generate the files and re-process

Update forecast on MoE STEO

Print, and check the SDR Summary reports on MoE STEO. Fax the SDR Broad Summary report to MoE on 04-463-2868

Submit the SDR by clicking on the green Submit SDR Full link on MoE STEO

*End

NZQA

TEC

Approved by TEC?

No

Yes

MoE

Validate SDR Files

Any Errors?

Yes

No

StudyLink

Student

* Repeatable Process:
The SDR processing and submission process shown on this diagram is repeatable. If for some reason a TEO is requested to reprocess and re-submit their SDR (or they choose to do so themselves) then they should make the requested changes in their SMS and then start with the first step on this diagram.

Legend

Boxes with green shading indicates a step in the process that the TEO must perform that is covered by the STEO website user guide – How to Set Up Courses and Qualifications for Youth Guarantee Reporting in the SDR

Boxes with red shading indicates a step in the process that the TEO must perform that is **not** covered by the STEO website user guide – How to Set Up Courses and Qualifications for Youth Guarantee Reporting in the SDR.

TEO's will need to contact the appropriate agency or download information referenced in this user guide to complete these steps

Boxes with yellow shading indicates a step in the process that is not performed by the TEO but the TEO either inputs to or uses an output from to continue the overall process. These parts of the process are **not** covered by the STEO website user guide – How to Set Up Courses and Qualifications for Youth Guarantee Reporting in the SDR

Note:
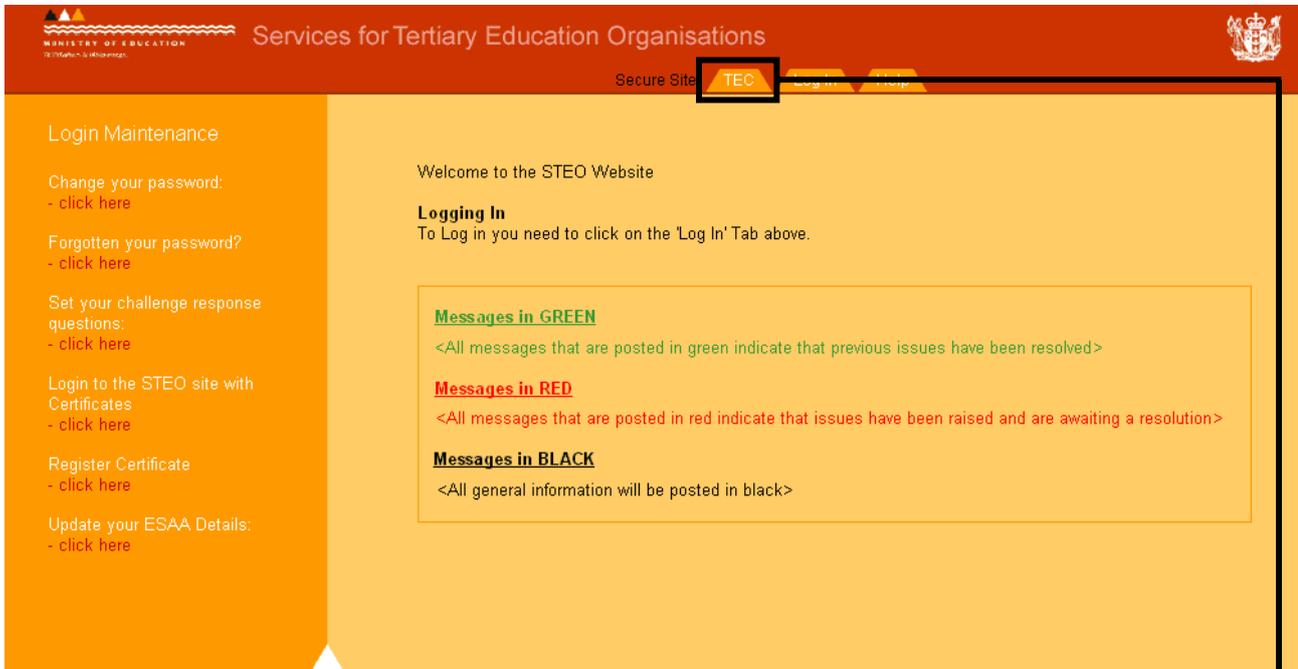The process as shown assumes certain prerequisites have been met:

- The TEO has an SMS capable of generating SDR files or the TEO has engaged an SMS vendor to provide a suitable bureau service

- The TEO has arranged for the appropriate systems access to the STEO websites with the MoE Contact Centre .

Getting started - Logging into TEC STEO

To log into TEC STEO, access the STEO website by typing in the following URL address: https://steo.education.govt.nz/secure/login.aspx.

You will be brought to the **Secure Site**:

Click on TEC to log into TEC STEO

You will then be directed to the ESAA login page.

Enter in your **User ID** here
Enter your **Password** here
Click **Logon** to login

What you will see first

Once you have logged in successfully, you will see the TEC STEO homepage.

This page contains important and general information regarding the current SDR Round, the STEO website and the TEC STEO website. If there are any important messages the Ministry of Education or TEC need to communicate out to TEOs, these will be posted on this page.
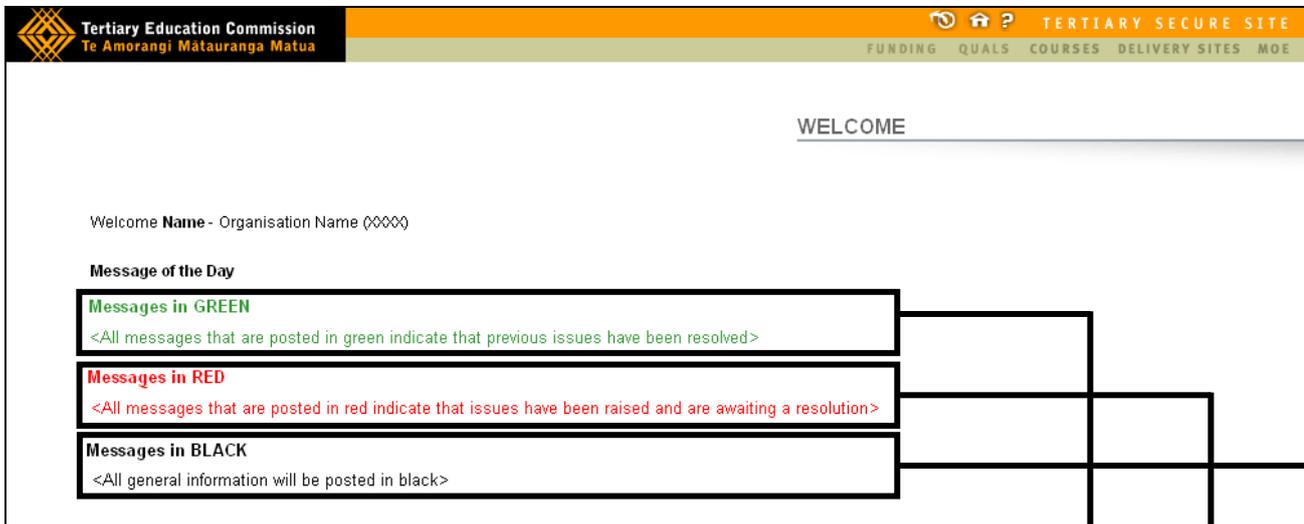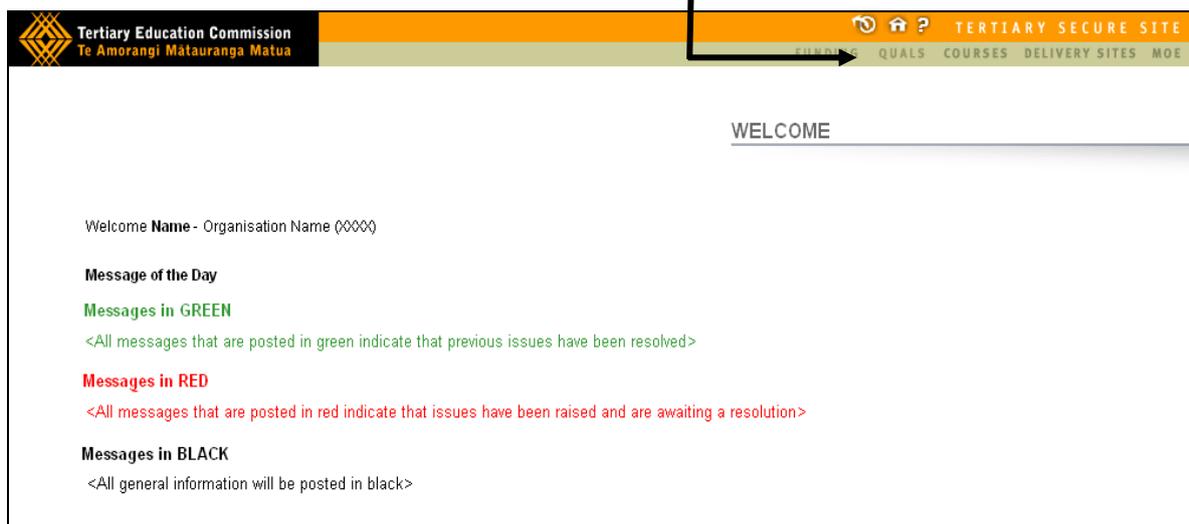

Messages that are posted in **GREEN** indicate that previous issues have been resolved.

Messages posted in **RED** indicate issues that have been raised and are awaiting a resolution.

All general information will be posted in **BLACK**.

There are various main menu items that will be visible.

A description of the menu functions is shown in the table below. **Note** – you will only be able to see the data for your TEO.

Part of Screen	Description

"Funding" link	• Note that this function is no longer used, but for providers who had funding limits or PBRF in the past, it does have historical data for previous years that is available for viewing. The Funding link lists Funding Limits and PBRF (Performance Based Research Fund) for TEOs.
"Quals" link	• Here users can search / edit qualifications, add new qualifications and see the status of their qualifications.
"Courses" link	• Here users can search / edit courses, add new courses and see the status of their courses.
"Delivery Sites" link	• Lists the delivery site or campus where qualifications and courses are delivered. Delivery Sites can also be added (with NZQA's prior approval) and deleted here. An addition or deletion of a site needs to be approved by TEC.
"MoE" link	• To go back to Ministry of Education's STEO site, click on this link. You will need to do this, for example, when you want to process your SDR files.

Qualification (Quals) Screen

In this section of the document, an overview of 'Quals' page will be given.

This is the page you will see when you click the 'Quals' link

Search / Edit Quals

On this page users can search and edit all qualifications that are delivered, or have been approved for delivery in the past, by their organisation.

- A search for a qualification can be performed by entering in one or more search criteria and then pressing the 'Search' button.

- Users can also view qualifications that are currently being delivered or have been approved for delivery in the past, by selecting the 'All' radio button in the 'Qualification Status' section of the page and then clicking the 'Search' button.

To Search or Edit existing Quals, click on the **Search / Edit Quals** link.

You will then be taken to the following page:

The Qualification search screen allows you to search for the approved qualification records for your organisation, to find a particular qualification, or to find a list of all the qualifications that you might be offering.

This screen gives you a number of search criteria, meaning that you can specify characteristics of the qualifications that you are searching for. Multiple criteria may be entered.

- Wild card searching using * (at the beginning or end) is allowed on qualification code and title.
- You can search on the status of qualifications by selecting the corresponding radio button i.e. Active, On-Hold, Closed or All
- You can also search on what qualifications are approved for i.e. Loans, EFTS Funding or Allowances

To open a qualification in Edit mode, click on the title or Qualification Code of the qualification you want to modify after searching. All the Qualification fields will be populated with the existing details of the qualification.

Add New Youth Guarantee Qual

If you are new to reporting via the SDR or require a new qualification for Youth Guarantee, then you will need to add a qualification by using TEC STEO – Qual – Add New Qual to register the qualification with TEC, and obtain approval for it.

Please note that from 2013 TEOs will also be able to deliver the National Certificate in Educational Achievement (NCEA) for Youth Guarantee only using one or more of the five Vocational Pathways. For the purposes of entering NCEA into STEO it should be set up as you would any other local qualification in the system, including breaking it down into courses. Like Youth Guarantee funded delivery, learners enrolled on NCEA may be eligible for a student allowance as per StudyLink's requirements (see Section 2 below for more on changes to SLA eligibility).
To ensure consistency across all TEOs offering NCEA, TEC is requiring the use of the following qualification codes to be used when setting up your qualifications in STEO.

Delivery of NCEA level 2 relate directly to the Vocational Pathway you are offering. If you are offering multiple pathways, you will need to set up a qualification for each.

There are five qual codes for NCEA level 2 linked to the Vocational Pathways:

Code	Title
NCEAP1	Construction and Infrastructure
NCEAP2	Manufacturing and Technology
NCEAP3	Primary Industries
NCEAP4	Service Industries
NCEAP5	Social and Community Services

TEC are aware of select cases where NCEA level 1 and NCEA level 3 are being delivered for Youth Guarantee. While level 1 assessment standards have been mapped to all five Vocational Pathways, the award of Vocational Pathways only occurs with the achievement of NCEA level 2. However, TEC does anticipate that the programme design and delivery of NCEA level 1 will align to those standards identified as part of the Vocational Pathways.

Similarly, level 3 standards have not been mapped to the Vocational Pathways. Thus for those select TEOs who received consent to assess for NCEA level 1 and/or NCEA level 3 from NZQA there is only one qualification code for each as outlined below. Should this change as a result of level three standards being mapped to the existing Vocational Pathway, TEC will provide additional advise to TEOs the delivery of NCEA level 3.

Code	Title
NCEAL1	National Certificate in Educational Achievement L1
NCEAL3	National Certificate in Educational Achievement L3

The process for adding a new qualification is as follows:

- Here users can add new qualifications that have first been approved by the New Zealand Qualifications Authority (NZQA).

- Field titles in red are mandatory and must be filled in.

- If the qualification is a National Qualification then the 'National Qualification' radio button must be selected. The qualification code must be picked from a list by clicking the '?' button, which is located under the label 'Qualification Code'.

- If the qualification is a provider-developed (local) qualification then the 'Local Qualification' radio button must be selected.

To add a new Qualification, click on the **Add New Qual** link.

You will now be taken to the '**Add New Qual**' data entry screen. Work down through the screen, completing the relevant fields as follows:

Section 1 – Identity

○ National Qualification ○ Local Qualification Qualification Code: [ ]	Select 1 of the 2 radio buttons. If National Qualification is selected, click on [?] to be taken to list of valid National Qualification codes which you may select from. For NCEA, select Local Qualification and use one of the qual codes outlined above in the qualification code box provided. For all other Local Qualifications select the button provided but leave the box blank and the system will allocate a qualification code to the new qual.
Title:(max 255 characters) [ ]	Enter the name of Qualification. Maximum of 255 characters
Contact: [▼]	Select contact person from your organisation from the drop down box. The names displayed in this box are those individuals with ESAA access in your organisation.
Reason for Change: (max 255 characters) [ ]	Enter Reason for Change or reason for request. Maximum of 255 characters e.g. "seeking qualification approval"

Section 2 – Status

First Taught Date: [_____] (dd/mm/yyyy)	Date the qualification will first be taught. Please note this date cannot be backdated for a new entry without TEC approval. Contact the TEC Service Centre if a backdated approval is being sought.
EFTS Based Funding: **Not Sought** ☐ Request Access Student Allowances: **Not Sought** ☐ Request Access Student Loans: **Not Sought** ☐ Request Access	The left hand column shows the current status "Not Sought" for these fields. Remember to tick the right hand tick boxes for what funding you will be applying for. For Youth Guarantee Under 18: EFTS based funding = Request Access Student Allowances = Request Access. Student Loans = Not Sought. For Youth Guarantee 18 and over: EFTS based funding = Request Access Student Allowances = Request Access. Student Loans = Request Access.
Qualification Approval Body: [_____] 🔴	Click on 🔴 to select the relevant Approval Body. Each approval body has a number code. In general Youth Guarantee providers should choose 1. NZQA. 1. NZQA 2. CUAP 3. ITPQ 4. CEAC 5. Academic Board 6. SkillNZ 7. Maritime Safety Authority 8. Other 99. Awaiting Confirmation
Teacher Registration Board Approval: ◯ Yes ◯ No ◯ N/A	Select the appropriate radio button regarding Teacher Registration Board Approval if applicable.

Section 3 – Duration

Tuition/Teaching (FTE) Weeks: [_____]	The overall number of full time equivalent weeks during which students studying this qualification are being taught, including study breaks (for example time given for examination preparation), from the first tuition date until after the last assessment or examination, but excluding holidays. Must be numeric with no decimals, and must be between 0-104.
Vacation/Recess Weeks: [_____]	Must be numerical with no decimal, and must also be between 0-104. Any eligible students on breaks of more than 3

	consecutive weeks will not be eligible for student allowances during that period.
Total Gross Weeks: 0	This field will auto-populate with the sum of what is entered in the Tuition/Teaching (FTE) Weeks and the Vacation/Recess Weeks fields.
Number of Years:	The total duration for a qualification can be entered as whole numbers and decimals (and this field can accommodate decimals). For qualifications more than 1 year, please enter the duration. For qualifications less than 1 year, please still enter 1 year as the minimum. Once you have entered the field 'tuition weeks', the system will then use the information you have provided in 'tuition week' and will automatically re-calculate this field for you.
Teaching Hrs/Wk:	The total number of teaching hours (i.e. tutor contact time) per week. Must be numeric and must be between 0-99.99.
Work Experience Hrs/Wk:	Number of work experience hours per week required for the qual. Must be numeric, can have decimals and maximum number you can enter is 99.99. If not applicable, enter 0.
Self-Directed Learning Hrs/Wk:	This includes the time an average student is expected to spend in unsupervised and independent study such as research, study groups, preparation and homework per week. This is a number field that can include decimals, and the maximum number you can enter is 99.99.
Total Learning Hrs/Wk: 0	This field will auto populate with the sum of what is entered in the Teaching Hrs/Wk, Work Experience Hrs/Wk and Self-Directed Learning Hrs/Wk fields.
Total Length: 0 Wks x 0 Hrs/Wk x 0 Years = 0 Hrs	⇨Total Tuition/Teaching (FTE) Weeks ⇨Teaching + Work Experience + Self Directed Learning ⇨Number of Years ⇨Total Number of hours for qualification These four fields are automatically populated.
Provider Credit/Points:	Credit Points are the number of credits or points that indicate the amount of learning required, on average, to complete the qual. This field requires you to enter any credit points allocated to a qual that are not encompassed by NZQF Credit points. Has a maximum of 3 characters and no decimals are allowed. Numbers must be between 1-1200. If all credits are linked to NZQF unit

	standards, please enter 1.
NQF Credits: [ ]	Refers to a qual made up of unit standards which are encompassed within the NZQF. This field requires you to indicate the total number of NZQF credits available within the qualification. In most cases, the NZQF system equates 120 credits with 1 full-time year of study and 1.0 EFTS unit. Field has a maximum of 4 characters, has no decimals and must be between 1-1200.
EFTS Value: [ ]	The EFTS value is expressed in numbers of EFTS units, and though it is initially calculated by TEOs, it is finally established by the Tertiary Education Commission (TEC) upon approval of the qualification. Calculations are based on full-time student workload. This value is calculated on the basis of credits, and/or full time teaching weeks, but the calculation based on credit values takes precedence. Maximum of 6 characters is allowed, must be numeric and between 0.001-9.9999. Refer to Appendix of this manual for further guidance on determining proposed EFTS values.
○ Part Time ○ Full Time	The system allows you to select either of the radio buttons, but if the qualification is delivered both full-time and part-time, please make sure you select full-time.

Section 4 – Description

Brief Outcome: (max 2000 characters) [ ]	Enter in the outcome of the qualification. This describes the aim or objectives of the qualification including whether the qualification is targeted to a particular or identified group. This field truncates if you enter more than 2000 characters.
Brief Contents: (max 2000 characters) [ ]	Enter in a brief description of the contents of the qualification. This field will truncate if you enter more than 2000 characters.
Brief Assessment Mode: (max 2000 characters) [ ]	Enter in brief details of assessments. This field will truncate if you enter more than 2000 characters.
Brief Entry Requirements: (max 255 characters) [ ]	Enter in details on any student entry requirements if applicable. Field will truncate if you enter more than 255 characters. Please note this field is not mandatory.
Qualification Award Category: [ ] ❓	Click on ❓ to view list of valid Qualification Award Categories. For Youth Guarantee qualifications, please choose 41 or 46.

Register Level[1] [text field]	Enter in Register Level of qualification. This field is formerly (and commonly) referred to as the NZQF Level.
ISCED Level: [text field]	International Standard Classification of Education (ISCED) is a classification of level of education ranging from 0-9 which was developed by UNESCO. Max 2 characters. You can find ISCED codes in the SDR Manual.
ISCED Subsequent Destination: [drop down box]	Select an ISCED Subsequent Destination from the drop down box. Choose the appropriate subsequent destination from: A) Designed to lead to higher educationally based education B) Designed to lead to higher vocationally based education. C) Designed to lead direct to the labour market. You need to select the one that applies to that qualification, it would be any of the 3.
NZSCED: [text field] [?]	Click on [?] to select a valid NZSCED that relates to the qualification. The NZ Standard Classification of Education is a subject based classification system for TEOs. Was developed by the Ministry of Education (MoE) and is hoped to improve the quality and consistency of statistics collected by agencies regarding tertiary education.
Source of Funding: [text field] [?]	Click on [?] to select a valid Source of Funding code. Please note this field is not mandatory. Maximum of 2 characters. For all YG quals, please choose 'M' from the list of codes
Distance Learning Available: [text field]	Enter in 'Y' or 'N' if distance learning is available. Please note this field is not mandatory.
Certifying Authority: [text field] [?]	Click on [?] to select a certifying authority for the qual. Please note this field is not mandatory. Maximum of 4 characters
Save Cancel	Click on Save to submit qual or Cancel to go back. Please note that you cannot save the page until all fields are completed.

Once the qualification has been successfully submitted in STEO it needs to be approved by TEC.

This requires TEOs to forward the NZQA approval documents for the qualification, to the TEC Service Centre. This will alert TEC to the fact that your qualification has been submitted and is awaiting approval.

Full view of 'Add New Qual' page:

QUALIFICATION DETAILS (NEW)

Identity
Status
Duration
Description

Save
Cancel

Identity
Fields in this colour must be supplied)

❶ ○ National Qualification   ○ Local Qualification
Qualification Code: Date Created: dd/mmm/yyyy
[   ]   Tertiary Resourcing Advisor: TEC advisor
Title:(max 255 characters)
[   ]

Contact:
[▼]
Reason for Change: (max 255 characters)
[   ]

Status
Qualification Status: First Taught Date: [   ] (dd/mm/yyyy)
EFTS Based Funding: Not Sought   Date: ☐ Request Access
❷ Student Allowances: Not Sought   Date: ☐ Request Access
Student Loans: Not Sought   Date: ☐ Request Access
Qualification Approval Body: [   ] ❓ Teacher Registration Board Approval: ○ Yes ○ No ○ N/A

Duration
Tuition/Teaching (FTE) Weeks: [   ]   Teaching Hrs/Wk: [   ]
Vacation/Recess Weeks: [   ]   Work Experience Hrs/Wk: [   ]
Total Gross Weeks: [0]   Self-Directed Learning Hrs/Wk: [   ]
❸ Number of Years: [   ]   Total Learning Hrs/Wk: [0]

Total Length: [   ] Wks x [0] Hrs/Wk x [   ] Years = [0] Hrs

Provider Credit/Points: [   ]   NQF Credits: [   ]
EFTS Value: [   ]   ○ Part Time ○ Full Time

Description
Brief Outcome: (max 2000 characters)
[   ]
Brief Contents: (max 2000 characters)
[   ]
❹ Brief Assessment Mode: (max 2000 characters)
[   ]
Brief Entry Requirements: (max 255 characters)
[   ]

Qualification Award Category: NZSCED:
[   ] ❓   [   ] ❓
Register Level[1]   Source of Funding:
[   ]   [   ] ❓
ISCED Level   Distance Learning Available:
[   ]   [   ]
ISCED Subsequent Destination: Certifying Authority:
[▼]   [   ] ❓

ISCED:

Save Cancel

[1]Formerly (and commonly) referred to as NQF Level

22

Pending Requests

To view your pending qualification requests, click on the **Pending Requests** link.
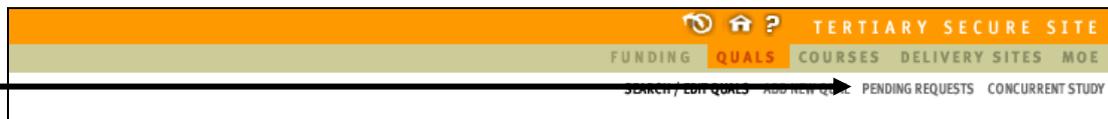
Here users view the status of their qualifications. There are six statuses that users can search against. These include:

- **All (except Approved)** – Searches for all qualifications, except ones that have been approved.

- **All** – Searches for all qualifications, regardless of status.

- **Submitted** – Searches for all submitted qualifications that need action by the TEC.

- **Open** – Searches for qualifications that have been opened and viewed by the TEC, but still need action by the TEC.

- **Accepted** – Searches for qualifications that have been approved by TEC.

- **Provider Action Required** – Searches for qualifications where the TEC requires clarification or further information from the organisation.

- **No Action Required** – Searches for qualifications that have been rejected.
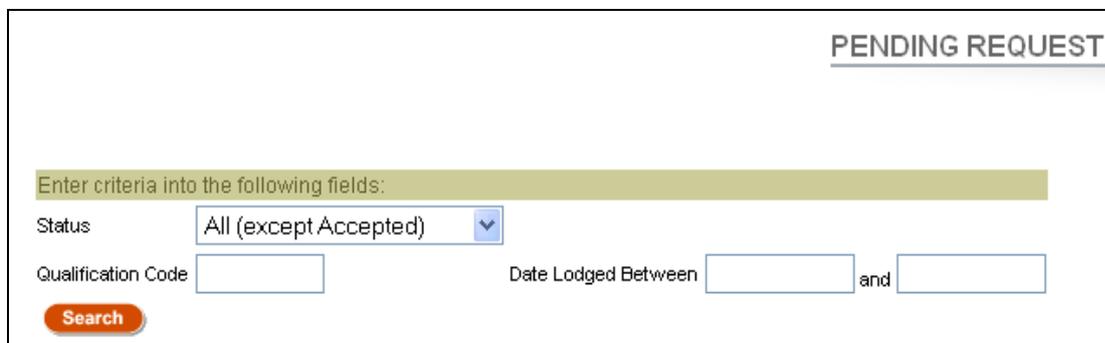
Concurrent Study

The primary purpose of the Concurrent Qualification function on TEC STEO is to allow a SAC funded TEO to join two or more qualifications together, and then provide the combined EFTS/teaching duration values to StudyLink for the purposes of calculating the correct loan and allowance eligibility for a students' total work load.

From 2013, TEC and StudyLink will require all TEOs who intend to use their qualifications for multiple sources of funding (for example SAC and YG) to utilise the Concurrent Qual functionality in TEC STEO for an additional purpose. Changes to the policy settings around age and SLA eligibility for Youth Guarantee mean that those qualifications only used for Youth Guarantee must NOW have a concurrent qualification set up for learners under the age of 18 (15-17)..

Note - For TEOs who set up qualifications for Youth Guarantee use only last year (i.e. without access to loans) the TEC has made changes to these qualifications to enable access. This means in some cases that TEOs can use the qualification code (not the concurrent qual) for VoSing to Studylink for 18 and 19 year olds..

The use of the concurrent qualifications function in the manner described below will enable the correct loans and allowances settings to be applied to the qualification in question. Those settings have now been aligned by age for Youth Guarantee and SAC levels 1-2 (both competitive and non-competitive), meaning that for TEOs using qualifications for both sources of funding the same concurrent qualification can be used based on age. For example, an 18 year old SAC funded student studying towards a level 2 qualification will be eligible for Student Loans (course related and living costs) the same as an 18 year old Youth Guarantee student studying towards that same qualification. In this situation, the TEO only needs to set up one concurrent qualification for use in both SAC and Youth Guarantee learners.

The setting up of concurrent quals, and each TEO's subsequent use of the concurrent qualification code when submitting Verification of Study (VoS) confirmations to StudyLink, ensures that learners are able to access the correct type of student support from the outset.

All concurrent qualification codes start with 'CO' in order to be easily identified.

Note – The 2013 rule that **All** TEOs using qualifications for multiple funds (e.g. SAC and YG) need to use CO qualification codes for VoS remains, however, this will now be determined by age and enrolment level Where a TEO offers a level 3 qualification for both Youth Guarantee and SAC, NO concurrent qualification is required for SAC level 3 enrolments, while up to two concurrent qualifications may be required for Youth Guarantee (under 18s and for 18-19 YOs)This will enable Studylink to verify the eligibility of learners for student support. CO qualification codes are **not** to be used in the SDR. For any Youth Guarantee enrolments reported in the SDR the qualification code the student is enrolled in should be used.

Note - See Appendix Two for a decision tree to assist in determining what qualification codes to use in either the SDR or the VoS.

To view approved, pending or rejected concurrent qualifications, click on the **Concurrent Study** link.

Users can view approved, pending or rejected concurrent qualifications on this page. Concurrent qualifications can also be added on this page.
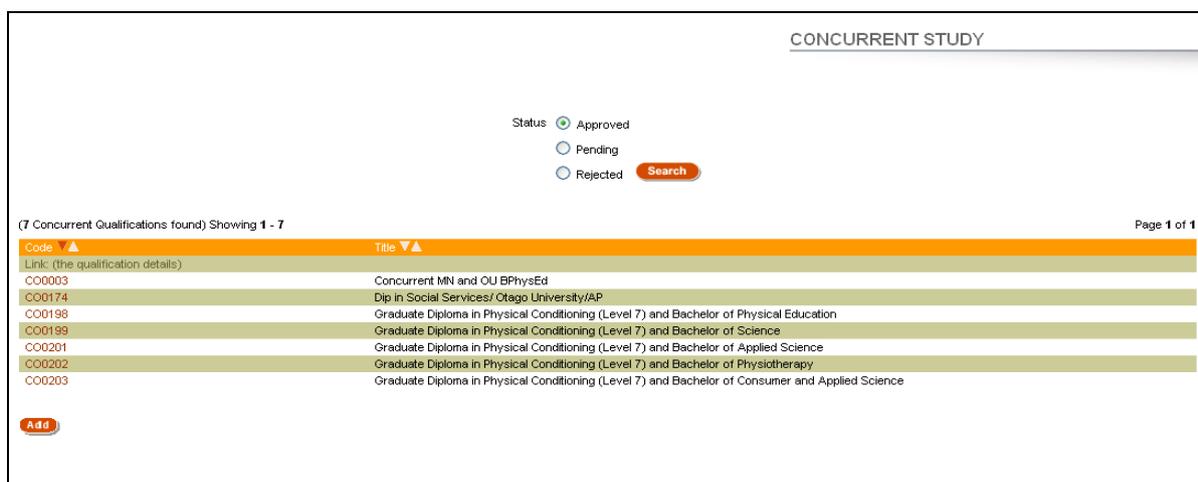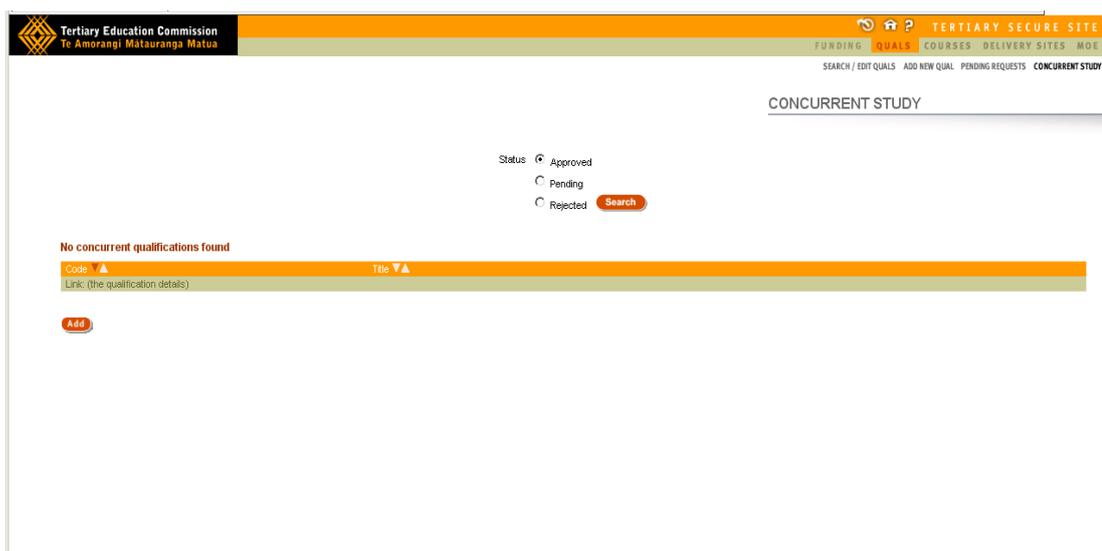

Set up Concurrent Qualifications for Youth Guarantee

The following instructions assume that your organisation already has NZQA and TEC approval for the qualification that you intend to offer under Youth Guarantee. If you do not yet have NZQA and TEC approval for your qualification then this is required before you can set up a concurrent qualification.

The following steps should be followed by TEO's when opening concurrent qualifications for Youth Guarantee use:

1. Go to the concurrent study menu in TEC STEO. This can be accessed via the MoE STEO site (the usual way) or direct to TEC STEO (http://steo.tec.govt.nz and then log in). The screen will look like this:

2. Click the add button, and the following screen appears:

Notice some fields are pre-filled i.e. the requester's provider code. The first and last dates should be changed to the dates from when the concurrent qualification will first be used and an estimate of the last time it will be used.

3. Fill out the required fields (title, for example Certificate of Carpentry under 18s, the TEO contact, reason for change, the first and last date the qualification is to be taught etc). Providers should ensure that the age range of the learners is contained somewhere in the title of the concurrent qualification (e.g. under 18s and over 18s).

4. Then in the qualification components section click on the question mark next to the qualification field and this will open up a list of all the qualifications that the TEO offers. Click on the one you want and the user will be returned to the "add concurrent qual" page. Repeat as needed with the addition of choosing the provider as well (click on the '?' next to the provider box). When finished, the screen will look something like this:

5. Click save. This will now make the concurrent qualification 'pending' and the user will see a 'CO' number in the concurrent qualification code box. This is the qualification code that the TEO must use if they submit a VoS to StudyLink.

6. After you have entered the required information click Save. Once saved, the following screen will be displayed.

7. Please send an email to sectorhelpdesk@tec.govt.nz to indicate your concurrent qualification has been submitted and is awaiting approval.

Courses Screen

In this section of the document an overview of 'Courses' page will be given. If you have set up a qualification in TEC STEO you will also need to set up one or more courses in conjunction with that qualification that can then be used to report enrolments in the SDR.

Note: A course register file which is part of the SDR can also be used to bulk upload course register entries/requested changes. However, if this method is used then some data fields for courses, for example learning hours and teaching weeks, can only be set up on the TEC STEO website and must be done manually as part of the course set up process. Information on how to put together and use the SDR can be found on the MoE STEO website.

Note: When populating the course information, you will be asked to provide details on course classifications and funding categories. While this information will not be used for funding purposes like it is for SAC, the information is required for processing an SDR and monitoring of delivery. For further information on course classifications and funding categories see TEC website.

Course disaggregation for NCEA

The TEC recommends that TEOs offering NCEA linked to one or more of the Vocational Pathways disaggregate these qualifications down to courses that are at unit standard level.

This is the page you will see when you click on the 'Courses' link.

Search/Edit courses

On this page users can search and edit all courses that are delivered or have been delivered in the past by their organisation.

- A search for a course can be performed by entering in one or more search criteria and then pressing the 'Search' button.
- Users can also view courses that are currently being delivered or have been delivered in the past, by clicking the 'Search' button without any of the search criteria fields populated.

To search or edit existing Courses, click on the **Search / Edit Courses** link

You will then be taken to the following page:

This screen gives you a number of search criteria, meaning that you can specify characteristics of the course that you are searching for. Multiple criteria may be entered.

- Wild card searching using the * at the beginning or the end means that you can search for all courses with a title that contains a particular sequence of characters.
- The Qualification, Funding Category, Course Classification and NZSCED fields have a ❓ graphic next to them. Clicking on this icon will show a page listing values that you can select for the field.
- Clicking the ❓ next to the Qualification Code will give you a list of all the approved qualifications at your organisation.
- Clicking the reset button will clear all fields allowing you to start your search again.

When you have entered in your search criteria and pressed the search button, a list that matches your criteria will appear. A maximum of 50 courses will be shown on the screen at a time.

The search results are sorted by Course Code by default, but you can re-sort the table by clicking on the ▼▲ arrows at the top of each column to sort ascending or descending on that column. Re-sorting will always return to showing the first 50 courses in the selected sort order.

Add New Course

Here users can add new courses so that they can be approved by the Tertiary Education Commission (TEC). Field titles in red are mandatory and must be filled in.

To add a new Course, click on the **Add New Course** link

You will now be taken to the **Add New Course** data entry screen.

Course Code		A unique code for this course/subject/unit that is assigned by you. The code should remain the same for the course regardless of delivery context, time or location. It is a mandatory field, has a maximum of 20 characters and must be a unique course code. Note: Once approved the course code cannot be edited.
Course Title		The course title should give a fair representation of the subject matter of the course. It is a mandatory field, and has a maximum of 75 characters
Applicable From Start Of		This is the year from which enrolments under this course code will be counted in the SDR under the parameters described in this entry in the course register. This date can only be the start of a calendar year. It is a mandatory field, and must be in the format of *yyyy*, e.g. 2008
Applicable To End Of		This is the year for instances in which you know that the set of parameters assigned to this course have a finite life span. The date for ceasing course details must be the end of a calendar year and must be in the format *yyyy*, e.g. 2008. Please note this is not a mandatory field. . **Note: Do not fill this field in until a course has closed.**
Qualification (PC Code)		Clicking on the ? will give you a list of all the approved qualifications available on your qualification register. This qualification is the 'home' qualification nominated for this course (not CO code). The course may be delivered under a number of qualifications without requiring multiple entries in the course register, but the 'home' qualification is the qual under which the course is recognised for quality assurance purposes. This is a mandatory field with a maximum of 6 characters.
Funding Category		Clicking on the ? will give you a list of all the valid funding categories. The funding category field denotes the funding rate that enrolments in the course will generate. TEC sets the funding category for courses, but you are required to propose a funding category. The funding category you enter must be valid for the course classification it falls into. This is a mandatory field and has a maximum of 2 characters. **Note**: Although a funding category must be set as noted above for SDR purposes, this does not denote the funding rate for Youth Guarantee. For Youth Guarantee the level of funding is determined between a TEO and TEC as part of the Youth Guarantee allocation process.

Course Classification	[ ] ?	Clicking on the ? will give you a list of all the valid course classifications. Course classification indicates the subject matter covered by the majority of the course in question. TEC sets course classification for courses, but you must propose a course classification based on the content of the course. This classification must be valid, and must also have a valid funding category. This is a mandatory field and has a maximum of 4 characters.
NZSCED	[ ] ?	Clicking on the ? will give you a list of all the valid NZSCED codes. This is a mandatory field, and has a maximum of 6 characters.
EFTS Factor	[ ]	This is the EFTS factor that you believe the courses study requirements represents. TEC confirms the course EFTS factor, but you must propose a factor. It has a maximum of 6 characters, up to 4 decimal places, and must be between 0.0001 – 2.0000. Refer to the appendix of this manual for information on calculating course EFTS Factors
Credit Value/Local Points	[ ]	This field refers to either the NZQF credits the course involves, or, for non-NZQF courses, the points or credits as defined by your organisation. The credit value cannot exceed 240. Please note this is not a mandatory field. It has a maximum of 3 numeric characters. **Note**: If the course is also used for SAC you **MUST** fill this field in.
Learning Hours[1]	[ ]	This field records the learning hours involved in the course. Please note this is not a mandatory field. It has a maximum of 4 numeric characters and must between 1-2400. **Note**: If the course is also used for SAC you **MUST** fill this field in.
Teaching Weeks	[ ]	The total number of teaching hours per week. Must be numeric and must be between 0-99.99. **Note**: If the course is also used for SAC you **MUST** fill this field in.
NZQF Level	[ ]	NZQF level was formerly (and commonly) referred to as the register level. It indicates the level/complexity of the learning undertaken in the course. Please note this is not a mandatory field and has a maximum of 1 numeric character. The entry must be between 0-8. **Note**: If the course is also used for SAC you **MUST** fill this field in.
Stage	[ ]	This field denotes the year of study that a course falls into, and is included specifically for pre-service teacher education courses. Please note this is not a mandatory field. The entry must be between 1-6.
Mandatory Course?	N	This field indicates whether the course in question is mandatory for the successful completion of the 'home' qualification, or if the course is an elective/optional course. The field will either accept a **Y** for yes, or **N** for no. Please note the this field will default to **N**.
Foreign Fee	[ ]	This field is required for Export Education Levy (EEL) purposes. The foreign fee must always exceed the fee for domestic students. This fee covers all domestic tuition fees, as well as the costs of sale such as agent's fees and marketing costs, as well as recovering the cost of EEL. Please note this is not a mandatory field and has a maximum of 5 characters.

FEE		This field contains the standard fee that domestic students normally pay for tuition and costs associated with enrolment in a course. Please note this is not a mandatory field and has a maximum of 5 numeric characters. **Note**: if the course is to be exclusively used for Youth Guarantee, the provider must enter the Fee as Zero (0). **Note**: If the course is also used for SAC you **MUST** fill this field in with the actual fee for the course.
CCCost Fee		The Compulsory Course Costs Fee includes such costs as compulsory administration charges, examination fees, other charges associated with a course or program of study, material charges, costs of field trips and any compulsory purchase of equipment or books through the TEO. Please note this is not a mandatory field and has a maximum of 5 numeric characters. **Note**: if the course is to be exclusively used for Youth Guarantee, the provider must enter the CCCost as Zero (0). **Note**: If the course is also used for SAC you **MUST** fill this field in with the actual compulsory course costs for the course.
Internet		This field is used to indicate whether teaching and learning in the course is currently available in part or as a whole via the internet. There are 4 codes you can use: 1. No Access 2. Web-Supported 3. Web-Enhanced 4. Web-Based Please note this field is not mandatory and has a maximum of 1 numeric character.
PBRF Eligible		This field is used to indicate whether the course is eligible for Performance Based Research Fund (PBRF). There are 5 codes available for use: M Masters (greater than 0.75 EFTS) D Doctorate (greater than 0.75 EFTS) L Part-time Masters C Part-time Doctorate X Not PBRF Eligible Please note this field is not mandatory and has a maximum of 1 character. **Note** - not applicable to Youth Guarantee.
Benchmark Fee	$0.00	Clicking on the will give you the benchmark fee for courses with the same course code to the course being created, if applicable. Some Tertiary Education Organisations (TEOs) charge different fees for the same course, for example: • When a course is delivered at different sites • When a course can be taken as part of a number of different qualifications • Where learners get a fee discount for early enrolment. Where different fees are charged, the highest fee/course costs that any group of learners may be required to pay to the TEO is to be reported as the benchmark fee. Please note this is not a mandatory field. **Note** - not applicable to Youth Guarantee.
Benchmark CCCost Fee	$0.00	Clicking on the will give you the benchmark cost fee for courses with the same course code to the course being created, if applicable. Please note this is not a mandatory field.

		Note - not applicable to Youth Guarantee.
Reason For Change		This field allows you to briefly explain why the course is being added or changed. This field accepts a maximum of 255 characters.
Literacy/Numeracy Indicator		This field will hold a Y or N to indicate if the course includes embedded literacy and/or numeracy. Specifically a course that embeds literacy and numeracy will deliver deliberate teaching of literacy and numeracy that is contextualised to the relevant curriculum and in response to the diagnosed learner needs.
Volume of Research Factor		The VRF is associated with the PBRF eligibility flag and is a multiplier that gives a measure of the research content of a course. For PBRF eligibility of X this field should be left blank. For PBRF eligibility of M or L it should be .75 to 1. For PBRF eligibility of C or D it should be 0 to 3. **Note** - not applicable to Youth Guarantee
Save Cancel		Click on Save to submit the course for TEC approval or Cancel to go back

Full view of 'Add New Course' page:

Once the Youth Guarantee courses have been successfully submitted in STEO, they need to be approved by TEC. If submitted courses have missing fields or incorrect data they are

returned to the provider with a status of 'provider action required' in order that they can be amended. Additional status types for courses are noted in the following section.

Please note: the Youth Guarantee qualification (the 'home qualification') needs to be submitted and approved before the courses are entered.

Pending Requests

To view your pending course requests, click on the **Pending Requests** link.

Here users view the status of their courses. There are eight statuses that users can search against. These include:

- **All (except Approved)** – Searches for all courses, except ones that have been approved.

- **All** – Searches for all courses regardless of status.

- **Submitted** – Searches for all submitted courses that need action by the TEC.

- **Open** – Searches for courses that have been opened and viewed by the TEC, but still need action by the TEC.

- **Approved** – Searches for courses that have been approved by TEC.

- **Approved with Change** – Searches for courses that have been approved, but with changes/conditions. These changes/conditions need to reflect provider's Student Management System (SMS).

- **Provider Action Required** – Searches for courses where the TEC requires clarification or further information from the provider about a course.

- **No Action Required** – Searches for courses that have been rejected.
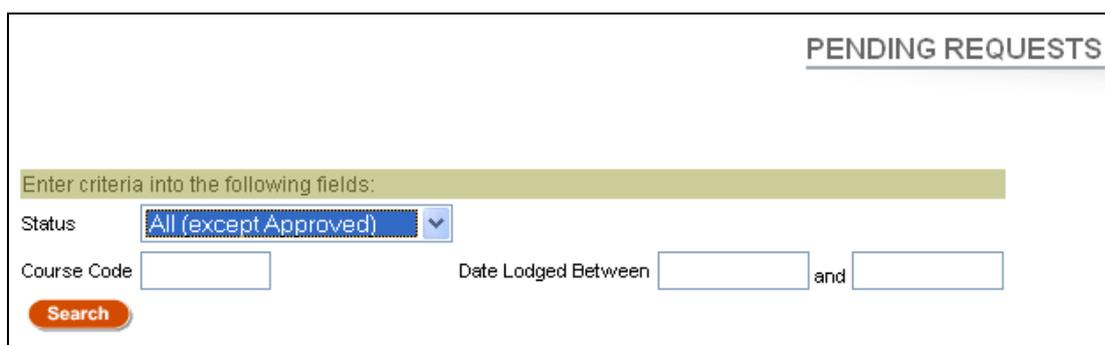
SDR Validation

All TEO's who receive Youth Guarantee funding are required to submit an SDR. The Single Data Return (SDR) is a set of data items that are specifically required by the Ministry of Education and the Tertiary Education Commission for funding, monitoring performance against Investment Plans, publishing performance information, as well as statistical reporting purposes.

Each SDR is required to be submitted during every calendar year according the SDR timetable. Failure to submit SDRs on time may result in payments being withheld by TEC. Full details of the timing and data required to be submitted in the SDR can be found in the SDR manual for 2013.

A guide to submitting an SDR can be found on the STEO website.

Delivery Sites Screen on the TEC STEO website

In this section of the document, an overview of the 'Delivery Sites' page will be given. You must have at least one approved delivery site to use when reporting enrolments in the SDR.

This is the page you will see when you click on the 'Delivery Sites' link.

Search

On this page users can view and edit all delivery sites that are delivered or have been delivered in the past by their organisation.

- Once you click on the 'Search' link, all delivery sites will be shown for the organisation. You can click on each link to view more details or to edit details of specific delivery sites.

- You can also delete delivery sites by clicking the box next to the delivery site you would like to delete, and then click on the 'Delete Checked' link.

To search for existing delivery sites, click on the Search link
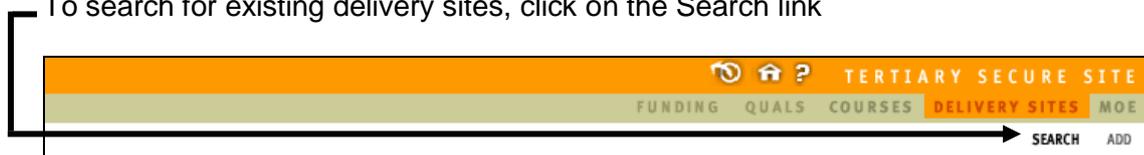
You will then be taken to the following page:
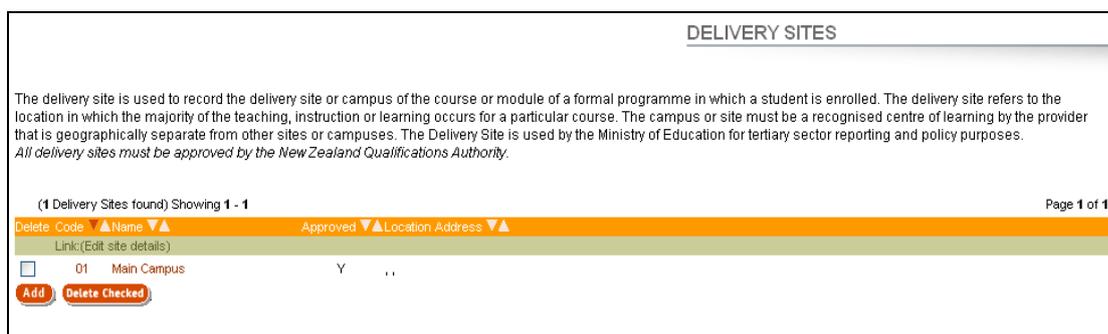
To view details of a particular delivery site, click on the code or site name. You will then be taken to a new screen showing address details, whether the delivery site is approved plus extra information generated by TEC.

Add

Here users can add new delivery sites that will need to be approved by the Tertiary Education Commission (TEC).

- Field titles in red are mandatory and must be filled in.

To add delivery sites, click on the Add link

You will then be taken to the **Add Delivery Site** data entry page:

Site Code: [ ] **Not Approved**	Enter in a unique Site Code. Site code needs to be two-digit code between 01-99 in accordance with the CRS_SITE field in the SDR manual. Field has a maximum of 2 numeric characters. **Not Approved** will show until TEC has approved the delivery site.
Site Name: [ ]	Enter in the name of the delivery site. Field has a maximum of 200 characters
Street Number and Name: [ ]	Enter in the Physical Address of the delivery site you are entering. Field has a maximum of 50 alpha-numeric characters.
Suburb: [ ]	Enter in the suburb the delivery site is located in. Please not this is note a mandatory field, and has a maximum of 25 alpha characters.
Town/City: [ ]	Enter the Town/City the delivery site is located in. Field has a maximum of 25 alpha characters.
Postcode: [ ]	Valid post codes should be used. Valid postcodes can be found here. The field has a maximum of 4 numeric characters.
MMP Electorate: Maori Electorate: Local Body: City District: Area Type: Ward: Census Area Unit: Meshblock:	These fields will be populated by TEC and MoE based on the site address entered.
Save **Cancel**	Click on Save to submit delivery sites or Cancel to go back.

Please forward the appropriate NZQA Site approval documents via email to sectorhelpdesk@tec.govt.nz to indicate your new or changed Site has been submitted for TEC approval.

Full view of 'Add' delivery site page:

DELIVERY SITE (NEW)

Please enter your Delivery Site's Physical Address - Red denotes mandatory fields

Site Code: [ ]   **Not Approved**

Site Name: [ ]

Street Number and Name: [ ]

Suburb: [ ]

Town/City: [ ]

Postcode: [ ]

MMP Electorate:

Maori Electorate:

Local Body:

City District:

Area Type:

Ward:

Census Area Unit:

Meshblock:

Save   **Cancel**

Appendix One

1. *Calculating EFTS for Qualifications*

Calculating the EFTS value of qualifications using **credits**

When calculating the Equivalent Full-Time Student (EFTS) value using the credits method, a tertiary education organisation (TEO) must do all of the following:

- Ensure that approval documentation includes the total credits required for the qualification, to establish its EFTS value
- Calculate the EFTS value of a qualification using credits as follows:

  1. Determine the standard number of credits that equate to one full-time year of study (120 credits)
  2. Determine the number of credits for the qualification
  3. Divide the qualification credits by the standard number of credits for one full-time year of study

- Check the credit EFTS value against the learning hours and teaching weeks calculation methods.

(SAC035)

See examples 1 and 2 in table below

Checking the EFTS value of qualifications using **learning hours**

To calculate the EFTS value of a qualification using the learning hours method, a TEO must:

1. Determine the qualification's total learning hours
2. Divide this by the standard measurement of a full-time year (1,200 hours).

(SAC036)

See examples 3 and 4 in table below

Checking the EFTS value of qualifications using **teaching weeks**

To calculate the EFTS value of a qualification using the teaching weeks method, a TEO must:

1. Determine the qualification's total teaching weeks
2. Divide this by the standard measurement of a full-time year (34 weeks).

([SAC039](SAC039))

See examples 5 and 6 in table below

	Qual credits	Qual learning hrs	Qual Teaching wks	Calculation	Qual EFTS value
Example 1	60			60/120	0.5
Example 2	120			120/120	1.0
Example 3		800		800/1200	0.6667
Example 4		1400		1400/1200	1.0*
Example 5			17	17/34	0.5
Example 6			40	40/34	1.0*

*Maximum EFTS for 1 year qual is 1, see [SAC034](SAC034)

2. *Calculating EFTS for Courses*

Calculating the EFTS factor of courses using **credits**

When a qualification is measured in credits, a TEO must calculate the EFTS factor for each course by:

1. Determining the number of credits in the course
2. Determining the total number of credits in the qualification
3. Divide the course credits by the qualification credits and multiply this number by the EFTS value of the qualification.

([SAC055](SAC055))

See examples 7 and 8 in table below

Checking the EFTS factor of courses using **learning hours**

When a qualification is measured in learning hours, a TEO must calculate the EFTS factor for each course by:

1. Determining the number of learning hours in the course
2. Determining the total number of learning hours in the qualification
3. Divide the course learning hours by the qualification learning hours and multiply this number by the EFTS value of the qualification.

See examples 9 and 10 in table below

Checking the EFTS factor of courses using **teaching weeks**

When a qualification is measured in teaching weeks, a TEO must calculate the EFTS factor for each course by:

1. Determining the number of teaching weeks in the course
2. Determining the total number of teaching weeks in the qualification
3. Divide the course teaching weeks by the qualification teaching weeks and multiply this number by the EFTS value of the qualification.

See examples 11 and 12 in table below

	Course credits	Course Lrng hrs	Course Tchg wks	Qual credits	Qual Lrng Hrs	Qual Tchg Wks	Qual EFTS value	Calculation	Course EFTS factor
Example 7	20			60			0.5	20/60 x 0.5	0.1667
Example 8	15			120			1.0	15/120 x 1	0.1250
Example 9		50			800		0.6667	50/800 x 0.6667	0.0417
Example 10		100			1200		1.0	100/1200 x 1	0.0714
Example 11			4			17	0.5	4/17 x 0.5	0.1176
Example 12			20			34	1.0	20/34 x 1	0.5000

3. *Convergence of calculations*

When TEOs calculate the EFTS factors of courses, they must use the same measuring tools used to determine the EFTS value of the qualification. There should be a convergence of the three methods (credits, learning hours, teaching weeks) of calculation when applied to the same qualification or course. For example, a qualification that consists of 120 credits should also have approximately 1200 learning hours and 34 teaching weeks.

The convergence of these three methods is a signal that learners studying for a qualification are undertaking a normal and reasonable workload. When they do not converge, the TEO should discuss with the TEC the issues this raises, including the most appropriate method to measure the EFTS value of the qualification.
(SAC040)

4. *Meeting the Loan-Entry Threshold (LET)*

From 2014, Youth Guarantee learners over the age of 18 will be able to access living costs. The TEC expects that current policy settings around no tuition or course related costs will remain, as the two funding rates include these costs. For learners under 18, they will still not be eligible for Student Loans, course related costs, compulsory fees to cover extra costs, or living costs.

Student Allowances are available when the required StudyLink criteria are met AND the Youth Guarantee qualification meets the Loan-Entry Threshold.

The loan entry threshold is used to determine whether a qualification is full-time or part-time. This affects the qualification's eligibility for learner access to student allowances. See the LET table on the TEC website for these thresholds.

Appendix Two – SDR and Concurrent Qual Decision Tree

Start here - Age of learner	SLA Entitlements	Funding type	Concurrent Qual, VoS and SDR Requirements	Source of Funding (SoF) in SDR

Is the learner under 18? — Yes → **No access to loans.** Can access allowances → What SoF is the learner enrolled on?

- Youth Gurantee (22)
- SAC L1-2 competitive (25)
- SAC L1-2 non competitive fees free (27)

Set up and VoS concurrent qualifications using the 'real' qual code. The same concurrent can be used for SoF 22, 25, and 27. Use 'real' qual code in SDR.

For SDR → Use SoF 22, 25 or 27 for enrolments

- SAC L1-2 non competitive fee paying (26)

No need for concurrent qual. VoS and use 'real' qual in the SDR.

For SDR → Use SoF 26 for enrolments

No →

18-19? — Yes → No fees, can access **CRC and LC**; Can access allowances → What SoF is the learner enrolled on?

- Youth Gurantee
- SAC L1-2 competitive
- SAC L1-2 non competitive fees free

No need for concurrent if the qual is ONLY used for YG or SAC competitive or SAC fees free (see note 1 in the Legend). For a qual that is used for multiple SoF set up a concurrent qual and use the concurrent for VoS. Use the 'real' qual code for SDR

For SDR → Use SoF 22, 25 or 27 for enrolments

- SAC L1-2 non competitive fee paying

No need for a concurrent qual. Use the 'real' qual code in the SDR and VoS.

For SDR → Use SoF 26 for enrolments

No →

20-24? — Yes → No fees, can access **CRC and LC.** Can access → What SoF is the learner enrolled on?

- SAC L1-2 competitive
- SAC L1-2 non competitive fees free

No need for concurrent if the qual is ONLY used for SAC competitive or SAC fees free (see note 1 in the Legend). VoS the same concurrent qual as used for 18-19 YO above if the 'real' qual is the same. If not, set up a concurrent qual using the 'real' qual and use this for the VoS. Use the 'real' qual code for SDR

For SDR → Use SoF 25 or 27 for enrolments

- SAC L1-2 non competitive fee paying

No need for concurrent. Use the 'real' qual in the SDR and VoS if not taking up fees free option.

For SDR → Use SoF 26 for enrolments

No →

25 years or older? — Yes → Normal SLA eligibility may apply according to SoF → What SoF is the learner enrolled on?

- SAC L1-2 competitive

No need for concurrent if the qual is ONLY used for SAC competitive (see note 1 in the Legend). VoS the same concurrent qual as used for 18-19 YO above if the 'real' qual is the same. If not, set up a concurrent qual using the 'real' qual and use this for the VoS. Use the 'real' qual code for SDR

For SDR → Use SoF 25 for enrolments

- SAC L1-2 non competitive fee paying

No need for concurrent qual. Use the 'real' qual code in the VoS and SDR.

For SDR → Use SoF 26 for enrolments

Legend:

Verification of Study (VoS)

Source of Funding (SoF)

Student Loans and Allowances (SLA)

Single Data Return (SDR)

Student Achievement Component (SAC)

Parts of the loan:
- Fees
- Course related costs (CRC)
- Living Costs (LC)

'Real' qualification code - the qualification code that corresponds to a qualification on the NZQF.

NOTE 1: Where more than one qual is required to make up a learners programme (for example three 40 credit quals), the concurrent qual function can be used to link these together for VoS purposes. In those cases a separate concurrent qual will be needed for both under 18's and or 18 and over to cover the learners programme. The 'real' qual codes should be used in the SDR.

NOTE 2: This graph details changes to the age and loan eligibility for Youth Guarantee and SAC L1-2, including making it fees free for under 25s **ONLY**.

It **DOES NOT** outline SAC L3+. For provision, the TEO should continue to use SoF 01 and allow access to loans regardless of age. There are no changes to the VoS process for SAC L3+.