

## Student Manager MoE July roll returns checklist

MUSAC

The main aim of the July return is to count students for determining school staffing for the following year. In Secondary and Area schools, subject information is also gathered for statistical purposes. This checklist provides an overview on how to check your data before July Returns Day (Wednesday **1 July** in 2015); what to do around the day, as well as troubleshooting errors.

SM provides an automated way to check data validity then collate these statistics into a series of printouts which emulate the MoE's own paper returns. In collating data, SM assesses the information against pre-set parameters and if anomalies are found, these are reported to you. These anomalies/errors can be critical (errors) or non-critical (warnings).

- Critical errors need to be corrected before carrying on - these could be 'a leaver without a leaving date', 'a 19 year old Year 1 student', etc.
- Non-critical errors highlight that some data is just outside the usual parameters and may or may not need correcting, eg. 'a 16yr old year 9 student' - could be a special needs student.



### July 2015 .moe file

#### 1 New fields added to the .moe file footer

Grouped into 15 new rows, 249 new fields have been added to the .moe file footer. These are equivalent to the content of Tables M3, E3, J3, S3, M4, E4, J7 and S4, to allow for introduction of the electronic sign-off.

#### 2 Changes to the business rules relating to FIRST SCHOOLING, Funding Year Level and Age

The purpose is to allow students coming from overseas to have the same FYL as other students the same age, regardless of their FIRST SCHOOLING day.

#### 3 New Exchange Programme Organisation

18 – New Zealand Switzerland Exchange

#### 4 Zoning rules

It is encouraged to give a value of INZN or OUTZ to all students who started after introduction of an Enrolment Scheme, regardless of their Student Type. But NAPP will still be an accepted value for Student Types not funded.

It is also encouraged to give the value of INZN to adult students who reside in zone.

When reporting zoning status data in Table M6, the students' zoning statuses will default to correct values eg. adults will default to OUTZ even if they reside INZN

#### 5 New subjects

Environmental Sustainability  
Equestrian  
Defence

**6 New STP code**

98 - STP Pilot Programme (Note this code is treated the same as Other (Code 99))  
Scenario where a student attending an STP who turned 19 before 1 January may generate a new validation error message "Continuing adult students cannot attend an STP without Ministry of Education approval"

**7 New field: STAR Funding**

To enable the Ministry to differentiate between those students who have participated in STAR and those who have not.

**8 Change to the specifications for Tables M7 and J11**

Exclude student types AE, FF, SA, NA and SF from the M7 and J11 tables..

**Well Before July 1**

Ensure you have at least version 15.2.13 of Student Manager (top left of any SM screen); the latest full release for the current year.

Locate and read through the MoE Roll Returns Guidelines document appropriate for your school type - available from:

[http://www.educationcounts.govt.nz/data-services/collecting-information/guidelines/school\\_roll\\_return\\_guidelines](http://www.educationcounts.govt.nz/data-services/collecting-information/guidelines/school_roll_return_guidelines)

Schedule MoE training with your Product specialist (North Island) or Solutions & Services (South Island).

Ensure ENROL and your SMS enrolments, leavers, international students' weekly fees and off-site student data is up to date. Every student must have an NSN. Check zoning and STP codes, and STAR funding data.

Run the **Validate data** routine (which does NOT create a returns file) from the MoE Returns area. This will list for you any data that does not fit into the MoE's predefined parameters. If you get a prompt about errors in your subject file (Secondary and Area schools only) click **Yes** to print the errors then click **Review Subject Codes**, and edit as necessary.

For your secondary school— while in the Review Subject Codes area, click **Unattached options** and either delete or connect any options listed (see onscreen instructions).

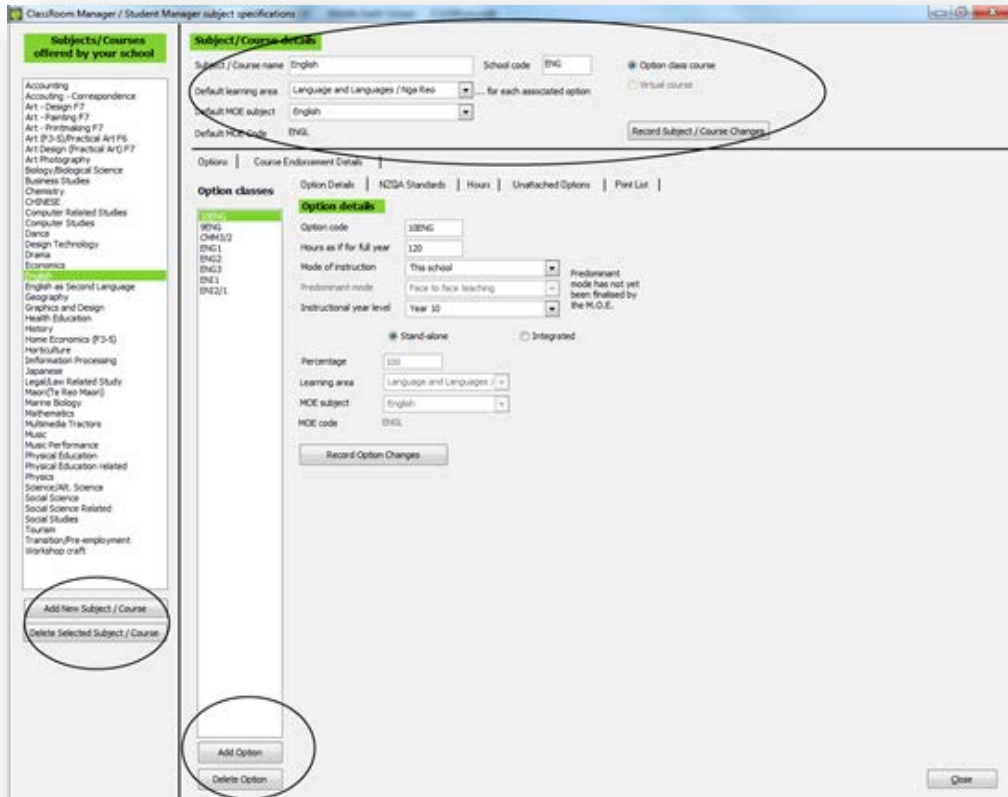
Print the various audit lists using the 'Today' option to check your data—for July Funding levels 1-8 only.

**Note:** For instructions on requirements for Returns tables – see Ministry current guidelines before submitting your .moe file electronically.

[http://www.educationcounts.govt.nz/data-services/collecting-information/guidelines/school\\_roll\\_return\\_guidelines](http://www.educationcounts.govt.nz/data-services/collecting-information/guidelines/school_roll_return_guidelines)

### Review Subject Codes

Area and Secondary schools only

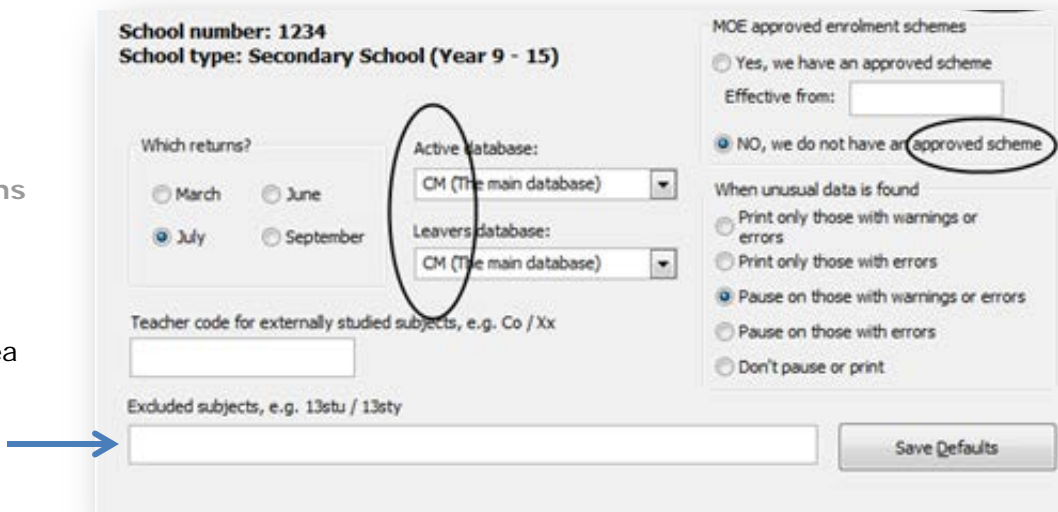


- All options found on your students need to have Learning Zone, MoE codes, Hours and Method of Instruction recorded against them.
- Use the **Print List** tab to produce lists of your Option/Subject connections.

### Initial Returns Screen

Select July Returns

Secondary and Area Schools enter excluded subject codes here



For your first validation select **Pause on those with errors** to check to see if you have a common error on a number of students. If you do see a common error click **Cancel** and use **Edit > Global code exchange** or click into **Grid mode** to correct.

### Option Sets

Area and Secondary schools only

Enter the option sets you are using for the current year (2015) and the number of weeks each is running for.

Which option sets are you running this year?

Option sets being used in <input type="text" value="2015"/>	No. of weeks active:
<input type="text" value="Options"/>	<input type="text" value="40"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

In order to calculate the number of hours per year each student takes a particular subject we need to know which option sets are being used during the year and how many weeks each set is running for.

### Second Validation run

After you have used **Pause on those with errors** to have a quick check of your data, go back into this first returns screen and choose **Print only those with warnings or errors**.

School number:

School type: **Secondary School (Year 9 - 15)**

Which returns?

March     June  
 July     September

Active database:

Leavers database:

Teacher code for externally studied subjects, e.g. Co / Xx

Excluded subjects, e.g. 13stu / 13sty

MOE approved enrolment schemes

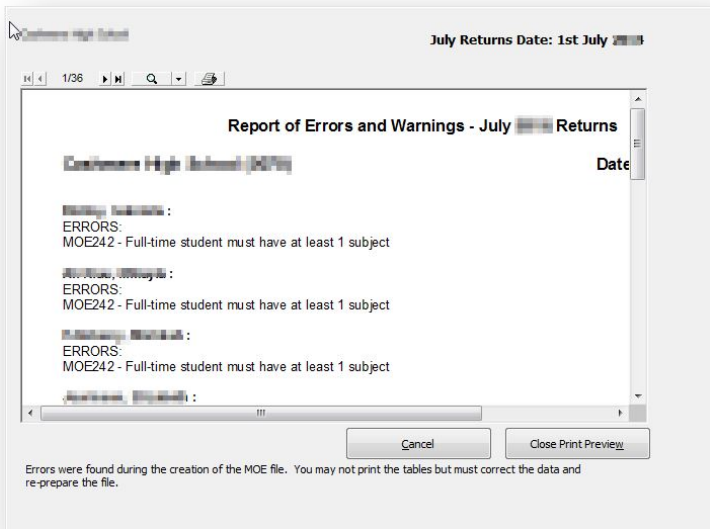
Yes, we have an approved scheme  
 Effective from:

NO, we do not have an approved scheme

When unusual data is found

Print only those with warnings or errors  
 Print only those with errors  
 Pause on those with warnings or errors  
 Pause on those with errors  
 Don't pause or print

Once the validation has run through, any errors and warnings will list on the screen in one or more pages. These can then be viewed and/or printed.



As before, use **Grid mode** to correct your data where necessary then re-run the validation routine to check everything is correct.

**Note:** Warnings may not need correction, just an explanation note sent back to the MoE with your completed return.

### Common Errors

While errors and warnings are trapped and displayed to you by the software, what they specifically mean and what to do about them is not always obvious. Below is a list of some of the most common errors and what to do about them.

(all the fields listed are on the Ministry page)

Use **Edit > Grid mode** to correct each of the following (fields cannot be blank):

- National Student Number
- Student's home address
- Zoning status

- ORS and Section 9 status (MOE 151)
- Māori Language Learning Index
- Pacific Medium Language Level
- Current year level

Secondary and area schools:

UE (for full time students Year 9+)

Non-NQF Qual (for full time students Year 9+)

Exchange Scheme (for exchange students)

Post-school activity (for leavers with reasons End of Schooling, Granted Early Exemption, Expulsion; or Gone Overseas)

Boarding status (for schools with boarding facilities)

Secondary schools have Secondary Tertiary Programme data included, the drop down for selecting your STP provider is on the Ministry Details page for each student.

The **Youth Services Initiative personal details** fields are included (unless the 'Withhold Contact Details for Youth Services' checkbox is completed) on the student's Personal Details page. Schools must notify students and caregivers regarding the details to be included in the extract.

### Year Level Errors - This Year vs MoE Year

Probably the most common 'error' that MUSAC is contacted about during returns time is apparent miscalculations in the number of students at each year level.

Returns tables are calculated on a student's **MoE year**, ie. calculated from the **First started any school** field, **not** the **This year** field. While these fields are usually the same, errors can be made in the data entry or because a student started school after 1 July. They begin as an MoE Year 0, although the school may have their **This year** field as Year 1.

To find any discrepancies create a user defined list which includes both the **This year** field and the **MoE year** field (**Script column > SM Specials**). Note the 'discrepancy' could be correct and not need editing.

### Other data errors

MUSAC - Date first attended this school (date) is prior to date starting any school (date)

Check the **Date started any school** field, it is newer than **Date started here** field

MUSAC - Ethnic 1 and Ethnic 2 are the same

The first two columns on the Ethnicities entries (Renamable1 or Ministry page) are identical. If both caregivers have the same ethnicity then this need only be entered into column 1

MUSAC - Year of schooling is missing

Enter a value into the **This Year** field

MUSAC - Student with status (Fulltime) should not have FTE<1, FTE = (Full Time Equivalent)

Check the **FTE field** on the Ministry page. Full time students should have 1.0 entered here

MUSAC - Student with status (Part time) should not have FTE=1

Check the FTE field on the Ministry page. Part time students should have less than 1.0 entered here. For example 16 hr/wk = 0.8, 12 hr/wk = 0.6, etc

MUSAC - Student with status (Full time or Part time) should not have a leaving date (date)

Remove the date from the Date of leaving field (Ministry page). It is likely the student left then returned very shortly afterwards and this field was not cleared when their status was changed back to Full time



MUSAC - Student with status 'Leaver' requires a leaving date  
The Date of leaving field is empty. Add it on the Ministry page.

### Common Questions

If a student leaves on July 1 do I count them on my school roll?  
Yes. If they leave on July 1 it means they left at the end of the day.

If a student arrives on July 1 do I count them on my school roll?  
Yes, as theoretically they left their previous school at least the day before.

Is a new entrant that arrives on July 1 a MoE Year 0 or 1?  
Year 1.

Print the Audit Class Lists before the 3 day count, have teachers complete the audit class lists over the 3 day period, and retain them along with a copy of the roll returns they have submitted to the MoE. Note the July Audit Class List only includes students in Funding year levels 1-8.

### Roll Count Tues 30 June — Thurs 2 July

The July Return does not have to be all sorted on Roll Count Day. As noted in the MoE guide, a school has until 10 August to get their information to the Ministry, there are just a few requirements for the actual roll count day listed below.

#### All School Types

Use the **Print MOE Audit List** function to print a full school roll. Reprint and keep these lists if any changes are made during the day or prior to sending the return.

Before Tues 30 June: Individual class lists printed for teachers to clearly indicate attendance before, on and after Roll Count Day. These rolls should be signed by the teachers, dated and returned to the office on 2 July.

Print the Māori Language Resourcing List.

#### Secondary and Area Schools

Not compulsory, but auditors may ask for it:

Print a list of all students showing the current options they are taking (**Fast lists** > tick **Options** or use Quickfind in Timetable Suite).

Essentially as long as an accurate roll count is done on 'roll count day' a school can then have a few days to check and recheck its data before sending it to the Ministry by 10 August.

#### Printing your MoE Returns

Once your data is error free you can print your Returns Tables to check that your data is as you expect it. To view the students that make up the statistics within the tables you can use the view in Excel button from the table preview screen.

If you then need to make changes to your data in SM you will need to go through the 'Prepare MoE Data File' routine again in order for these changes to be reflected in the MoE tables.

## Youth Services initiative

It is important to note that unless the Youth Services Initiative checkbox to suppress the additional contact details being included (on the request of the student or caregiver) is ticked, the data will be included in the .moe extract. In addition, a .csv extract will be possible for this purpose outside of the roll return period to accommodate the roll changes which occur after 1 September. This data is sent by default, unless the 'Withhold Contact Details for Youth Services' checkbox is completed in the student PersonalDetails.dmt provided by MUSAC. If you create your own Personal.dmt, edit the document and insert the 'Withhold Contact Details for Youth Services' column.

## Electronic data collections

Schools should run the 'Test Communications' prior to **1 July** in order to check that they will be able to successfully send their .moe electronically once they have completed their returns.

## Submitting your .moe file through SM

Once all the statistics on your MoE tables are correct and you have printed the final paper version of your Returns for your reference, the related .moe file will have been saved into your 'CM\MoE Returns 2015' folder. This is a digital version of your printouts submitted for processing by the MoE.

This file can then be sent electronically to the MoE through SM. To do this the latest MoE supplied 'Wrapper' software and related .Net 3.5 system files need to be installed onto the PC which will be used to send the file. These would usually have been installed for the March Returns but if required, both of these installs are available from the Downloads page on our website: [www.musac.co.nz](http://www.musac.co.nz).

Once installed go to SM>Configure Settings>Enrol Configuration and complete the first four fields relating to your school's Proxy Settings. No other fields should be altered. Click 'Save' then click 'Check Connectivity Only'. You should get a confirmation message back from the MoE server. If you get no response or receive an error message then please check your proxy settings and retry the test.

Once you have had a successful test and completed your MoE Returns, send your returns to the MoE by clicking 'Submit .moe file to Ministry'.



## Submitting your .moe file through the Ministry of Education Web Portal

If for any reason you are unable to submit your .moe file electronically through SM, use the MoE Leadspace website to upload the file using the following steps.

- 1 Go to the Leadspace Portal logon at: [https://web.minedu.govt.nz/eadmin/sia\\_login.asp](https://web.minedu.govt.nz/eadmin/sia_login.asp)
- 2 Enter your Leadspace User ID and password (supplied by the MoE)
- 3 Under Applications click the 'Student Data Upload' link
- 4 Under the 'Select the Roll Return File on your computer ...' heading, Click on "Browse..." and navigate to the relevant .moe file:
  - a. In the CM\MoE Returns 2015 folder
  - b. The file is named xxxxJ15.moe - where xxxx is your MoE school number
  - c. You may have several files with similar names created as you sorted your errors out. These will have a letter between the J15 and the .moe suffix. The 'Final' correct file that should be selected has no letter between the J15 and the .moe suffix in the filename.
- 5 Select the file and click the "Send the file" button and wait:
- 6 Once it is finished a 'Your file was uploaded successfully' message will display.

For further technical assistance please contact MUSAC Support.

For more detailed training, contact our Product Specialists (North Island) or Solutions and Services (South Island).

[Product Specialists](#)

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