

Interim solution guidance for TEOs who submit data using SDR

This document provides important guidance for TEOs who submit data using the SDR. The majority of this information relates to the Unified Funding System (UFS) interim data exchange solution, effective from 1 January 2023

What is the UFS interim solution

The intent of the UFS is to put the needs of learners at the centre to ensure they can access training that is right for them, at the right time and in the right place. The interim solution supports UFS from 1 January 2023. It aims to minimise any system impacts on TEOs and student management system vendors through use of existing tools and data. A longer-term solution will be implemented from 2025.

Source of FUNDING in the SDR Enrolment file

The new source of funding (SoF) code 37 in the FUNDING field in the enrolment file identifies Delivery at Level 7 (degree) and above (DQ7Degree+) separately from Non-degree Delivery at Levels 3-7 on the NZQCF (DQ3-7) delivery.

It is required in order to collect data and report separately on the two different funding streams.

Note provider-based courses can be delivered as part of a degree programme or a non-degree programme.

SoF 01: Delivery at Levels 7 (degree) and above (DQ7Degree+)

- **Continue** to use SoF01 if the learner is enrolled in a programme of study at degree and above
- **Continue** to include this delivery in the SDR forecast file (as usual)

SoF37: Non-degree Delivery at Levels 3-7 on the NZQCF (DQ3-7)

- **Start** to use SoF37 if the learner is enrolled in a provider-based, or provider-based: extramural programme of study
- **Note** that this provision would have been included in SoF01 up to the December 2022 SDR
- **Start** to include this delivery in the SDR forecast file

SoF29: Māori and Pasifika Trades Training (MPTT) Levels 3&4

- **Continue** to use SoF29 for MPTT L3&4 provision
 - **Continue** to include this delivery in the SDR forecast file (as usual)
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Cross-year enrolments under SoF01

For learners who are enrolled in a course under SoF01 where the course start date is on or before 31/12/2022 and the end date is on or after 1/1/2023.

- **Continue** to report this delivery under SoF01.
- **Note** that the TEC will “move” the 2023 delivery out of SoF01 and into SoF37

Note this avoids the need to unenrol (from the SoF01 course) and reenrol to submit the 2023 portion of the course under SoF37.

ATTEND field in the SDR

Continue to use the existing codes in the ATTEND field to distinguish between intramural and extramural.

Enrolment file

Mode of delivery for UFS provision (reported under SoF37) will be identified by the data in the SDR ATTEND field:

- Provider-based: Field codes **1** Intramural and residing in New Zealand and **4** Intramural and residing overseas
- Provider-based extramural: Field codes **2** Extramural and residing in New Zealand and **3** Extramural and residing overseas

UFS Funding rates (F1 – F6)

For SoF37-DQ3-7, the TEC will use the course classification code and funding rate ID to map to the UFS F1-F6 rates. Refer to the funding rates and mapping table on the TEC website [here](#).

- **Continue** to use the correct course classification codes & funding rate ID
- **Note** for SoF37 course classification code plus funding rate ID map to the new UFS funding rates (F1 – F6)
- **Note** Delivery Classification Guide for 2023 is the new name for the Course Classification Guide, and will be published shortly

SDR validations – new and changed

New and changed validations will apply from April 2023. Click [here](#) for a full list of new and amended SDR validations.

- **Note** the new validation will be included in the updated SDR Manual to be published shortly
- **Note** all qualifications require a valid NZQCF level. Qualifications that do not have a valid NZQCF level will fail validation.

Sub-contracting arrangements

- **Note** if you are **sub-contracted** (e.g. not directly funded by the TEC) to deliver off-job training, such as block-courses, on behalf of an Industry Training Register (ITR) submitter do NOT report this delivery via your SDR. The ITR submitter is required to report this delivery in their SDR submission.

Information products – Qlik apps

My Commitments – SDR Qlik app

- **Start** to use *My Commitments – SDR Qlik app* to view commitments submitted relating to SoF37 Non-degree Delivery at Levels 3-7 on the NZQCF (DQ3-7)
- **Continue** to use this app for other SDR-related commitments and actuals
- **Note** *My Commitments – SDR Qlik* incorporates the new UFS funding rates and modes of delivery

Qlik Apps Work in Progress

- **Note** that other apps will be progressively updated and two new apps specifically related to UFS provision are under development (My Provision - UFS and My Commitments – UFS). More information will be provided 2023.