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| Data changes for August 2025 SDRVersion 0.1Released 22 November 2024 |

Contents



Section heading

[Contents 2](#_Toc182563712)

[Introduction 3](#_Toc182563713)

[Document purpose 3](#_Toc182563714)

[Summary of change required for August 2025 SDR 3](#_Toc182563715)

[Implementation timing 4](#_Toc182563716)

[Data specifications 5](#_Toc182563717)

[Learner 5](#_Toc182563718)

[Course register 6](#_Toc182563719)

[Course enrolment 7](#_Toc182563720)

[Qualification completion 8](#_Toc182563721)

# Introduction



Section heading

## Document purpose

This document is for tertiary education organisations (TEOs) delivering provider-based learning reporting via the Single Data Return (SDR). It has information about the data that the Tertiary Education Commission (TEC) requires to be submitted from the August 2025 SDR.

## Summary of change required for August 2025 SDR

### Course Register

Learning Hours and Volume Research Factor can be entered manually in DXP’s Course Register but are not included in the SDR Course Register CSV file. Currently, TEOs that use the CSV file to upload new courses into DXP must complete a two-step process and enter these fields manually. We are adding these fields to the SDR course register file to expedite course setup for TEOs who use these fields.

### Course Enrolment

The Managed Apprenticeship field was initially removed from the data specification to align with the UFS requirements. A decision has been made to reinstate the field and it will be available from the August 2025 SDR submission. However, the field is renamed to Apprenticeship. It will not be available for the March 2025 Indicative and April SDR submissions.

### Final-year Fees Free

With the move from first-year to final-year Fees Free, learners beginning their final year of study from 2025 may claim the fees for their final year from the government after completing their first eligible qualification.

Inland Revenue (IR) will administer payments to learners. TEC is responsible for checking qualification eligibility, calculating the learner entitlement, and providing data to IR to support learner eligibility checks and facilitating payment to the learner. To support this process, TEOs must provide additional data through SDR, replacing the process where TEOs provided data for first-year Fees Free via Workspace2.

A summary of the new data required to support final-year Fees Free is summarised below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Field name** | **Reason** | **File** | **Mandatory?** |
| IRD number | Identification of the learner and to support the learner experience with IR. There is an option to capture on the qualification completion file if IRD number is not known at the time of enrolment. | Learner/ Qualification Completion | No |
| Secondary school programme indicator | Indicates whether a course has been undertaken as part of the student’s or trainee’s school learning programme or secondary-tertiary programme. These course enrolments are excluded from Fees Free | Course Enrolment | Yes |
| Actual course fee amount  | Captures the course tuition and the compulsory course costs charged to the learner. This value is used as part of establishing the Fees Free entitlement for learner. | Course Enrolment | Yes |
| Qualification completion date | The date the requirements have been met by the learner to be awarded the qualification. | Qualification Completion | Yes |
| Linked Qualification for Fees Free | Used for exit qualifications or expired qualifications when the learner’s course enrolments have been reported under a different qualification code than the one completed. | Qualification Completion | No |

## Implementation timing

We are aiming to implement the new data requirements for the August 2025 data submission. However, we won’t start work until after the April 2025 SDR submission, so we don’t place any unnecessary risk on the migration of all TEOs onto DXP Ngā Kete in early 2025.

Similarly, we integrate the new data requirements into the SDR data specification in early May 2025 after the April SDR submission.

**Important note:** If any of the new fields are included in an SDR submission before August 2025, it will fail validation. We will advise when the fields will be available to test against.

# Data specifications

## Learner

| **Field Title** | **Description** | **Field specification** | **Validation** |
| --- | --- | --- | --- |
| IRD Number | IRD number of the learner. The IRD number enables data matching to support the learner in claiming their Fees Free entitlement. Learners will apply for their Fees Free entitlement via myIR. To match the learner’s data (such as course fees) provided by TEC, Inland Revenue will use the learner’s IRD number. (They will also use NSN and date of birth).While this field is not mandatory, TEOs are encouraged to provide the learner’s IRD number upon enrolment. If a learner is eligible and their TEO has not reported an IRD number, they will be required to provide additional information via myIR to enable accurate matching. This may require the learner to request additional information from their TEO to confirm their identity with Inland Revenue.There will be cases where a learner does not have an IRD number at the time of enrolment, you can provide the IRD number in a subsequent SDR submission. There is also an alternative to provide the IRD number on the Qualification Completion file when submitting the learner’s qualification completion details. | **Type:** String**Length:** 11**Type of enrolment:** D**Guidance:** Only provide an IRD number for a who learner who may meet the eligibility criteria for Fees Free at the time of enrolment. In situations where you know the learner is not eligible, you will not need to collect their IRD number. For example, where a learner:* has received Fees Free entitlement previously (e.g. first-year Fees Free)
* is not studying an eligible qualification
* does not meet prior study criteria
* will not meet residency criteria at the time they are awarded their qualification

We are using Inland Revenue’s checksum code to validate the IRD number. However, we cannot determine if the learner provided an IRD number that does not belong to them. Inland Revenue will work directly with the learner to resolve this situation.The validation rule will only be triggered if a value is provided in this field. | **Error:**780: IRD number is invalid |

## Course register

| **Field Title** | Description | **Field specification** | **Validation** |
| --- | --- | --- | --- |
| Learning Hours | The learning hours involved in the course.  | **Type:** Numeric (6,2)**Type of enrolment:** N/A**Guidance:** Enter a value to a maximum of 6 numeric characters, with up to 2 decimal places. The value entered must be between 0-2400.99 inclusive. | **Error:**781: Learning hours must be between 0 and 2400.99 |
| Volume Research Factor | The Volume of Research Factor (VRF) is associated with the PBRF eligibility and is a multiplier that measures the research content of a course.  | **Type:** Numeric (5,4)**Type of enrolment:** N/A**Guidance:** Enter a maximum of 5 numeric characters with up to 4 decimal places. The valid VRF range for PBRF eligible courses is defined as follows:

|  |  |
| --- | --- |
| **M** | Blank or between 0.75 and 1.0  |
| **D** | Blank or between 0.0 and 3.0  |
| **L** | Blank or between 0.75 and 1.0  |
| **C** | Blank or between 0.0 and 3.0  |
| **X** | Blank |

 | **Error:**782: The Volume of Research Factor must be blank or between 0.75 and 1.0 if PBRF Eligible Course Indicator is L or M783: The Volume of Research Factor must be blank or between 0.0 and 3.0 if PBRF Eligible Course Indicator is C or D784: The Volume of Research Factor must be blank if PBRF Eligible Course Indicator is X |

##

## Course enrolment

| **Field Title** | **Description** | **Field specification** | **Validation** |
| --- | --- | --- | --- |
| Apprenticeships | Identifies if a learner is enrolled as a New Zealand Apprenticeship | **Type:** Character**Length:** 1**Type of Students:** D**Classification:** Enter a value of Y if the enrolment is for a New Zealand Apprenticeship. | **Error:**644: New Zealand Apprenticeship in not Y or blank645: The funding code must be 02, 03, or 37 if New Zealand Apprenticeship is Y646: The Category of Fees Assessment for International Students must not be 12 if New Zealand Apprenticeship is Y 647: Intramural or Extramural Attendance must be 1 or2 if New Zealand Apprenticeship is Y648: NZQF Level must be 3 or 4 if New Zealand Apprenticeship is Y677: The Qualification Award Category must not be 90, 91, 97 or 99 if New Zealand Apprenticeship is Y |
| Secondary School Programme Indicator | Indicates whether a course has been undertaken as part of the student’s or trainee’s school learning programme or secondary-tertiary programme. These course enrolments are excluded from Fees Free.  | **Length:** 1**Type:** Character**Type of enrolment:** D**Guidance:** Select a value from the list below.

|  |  |
| --- | --- |
| **Y** | Yes. For when a course enrolment is part of a learner’s secondary school programme |
| **N** | No. For when a course enrolment is not part of the learner’s secondary school programme |

This field is mandatory. | **Error:**785: Secondary School Programme Indicator is not **Y** or **N** 786: Secondary School Programme Indicator is blank |
| Actual Course Fee | The actual cost of the course charged to the learner for: 1. Tuition fees
2. Compulsory course cost fees.

The amount recorded must be inclusive of any discounts and must include GST. | **Type:** Numeric (8,2)**Type of enrolment:** B, C, D**Guidance:** Enter the dollar value with two decimal places, **including** GST.This field is mandatory. | **Error:**787: Actual Course Fee is blank788: Actual Course Fee is not numeric789: Actual Course Fee is less than 0 |

## Qualification completion

| **Field Title** | **Description** | **Field specification** | **Validation** |
| --- | --- | --- | --- |
| IRD number | IRD number of the learner. The IRD number enables data matching to support the learner in claiming their Fees Free entitlement. Learners will apply for their Fees Free entitlement via myIR. To match the learner’s data (such as course fees) provided by TEC, Inland Revenue will use the learner’s IRD number. (They will also use NSN and date of birth).While not mandatory, TEOs are encouraged to provide the learner’s IRD number upon enrolment. If this was not possible, the IRD number can be captured here when recording the learner’s qualification completion. | **Type:** String**Length:** 11**Type of enrolment:** D**Guidance:** Only provide an IRD number for a learner here if it has not been previously provided via the learner file and the learner may meet the eligibility criteria for Fees Free at the time they met the requirements to be awarded the qualification. We are using Inland Revenue’s checksum code to validate the IRD number. However, we cannot determine if the learner provided an IRD number that does not belong to them. Inland Revenue will work directly with the learner to resolve this situation. | **Error:**790: IRD number is invalid**Warning:**791: IRD number is different to what was provided on learner file |
| Qualification Completion Date | The date the requirements have been met by the learner to be awarded the qualification. This should align with what is reported for the 'Year Requirements Met' field.” | **Type:** Date**Type of enrolment:** B, C, D**Guidance:** DD/MM/YYYYThis field is mandatory. | **Error:**792: Qualification Completion Date is blank793: Qualification Completion Date format is invalid794: Qualification Completion Date is in the future795: Qualification Completion Date is prior to the end date of the last course that the learner enrolled in. |
| Linked Qualification Code for Fees Free | Used for exit or expired qualifications when the learner’s course enrolments have been reported under a different qualification code than the one completed. The link will identify the qualification that the original course enrolments and course fees are reported under to calculate the learner’s entitlement for Fees Fee.  | **Length:** 6**Type:** Alpha-Numeric**Type of enrolment:** D**Guidance:** The value should be a six alpha-numeric code as on the SDR Qualifications Register which uniquely identifies a quality assured qualification.  | **Error:**796 Qualification Code is not listed in SDR Qualifications Register797: Qualification code cannot be blank798: There are no enrolments for this learner under this qualification  |

Published by the Tertiary Education Commission

Te Amorangi Mātauranga Matua

National Office

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PO Box 27048

Wellington, New Zealand

November 2024

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