



MINISTRY OF EDUCATION

Te Tāhuhu o te Mātauranga

2007 Roll Return Guidelines

Primary and Intermediate Schools

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Overview

Introduction

Welcome to the 2007 Roll Return Guidelines. The Ministry of Education carries out statistical collections (referred to throughout this document as roll returns) from all schools in New Zealand at 1 March and 1 July each year.

The Ministry uses the data you provide through these collection exercises in a number of ways: to fund and staff schools, to support policy analysis, to monitor the outcomes of the New Zealand education system, and for national and international reporting purposes.

Purpose of these Guidelines

These guidelines are designed to support all schools through the roll return process, irrespective of whether your school:

- Uses a computerised Student Management System (SMS) to produce some of the required roll return tables; or
- Completes your roll returns by hand without the aid of a computer/computer system.

These guidelines set out information to help you provide accurate, correctly-formatted roll return data.

We hope they will prove useful and that they will help to explain why we ask you to provide the information we do.

You will also be able to access this document on the website:

www.educationcounts.edcentre.govt.nz/goto/guidelines

Information privacy

Information relating to individual students and staff members employed by the school board of trustees will be treated as confidential by the Ministry of Education, and access to the information will be restricted to authorised personnel working within the Ministry.

Release of this information outside the Ministry will only occur in aggregate statistical form, and no information which identifies individuals will be made available to any individual, group, or agency outside the Ministry.

While the names of Board of Trustees members remain public information, any other information collected about individual members will be treated in a similar manner to information collected about students and staff.

Update on electronic data collections

Electronic roll returns pilot

Important information for all schools using an SMS

During **2007 all roll returns** will need to be completed **using the standard process** of producing the roll return tables and manually sending them in to the Data Management Unit.

The Ministry of Education is working towards electronic data collection processes for roll returns. Further development of electronic processes for sending, receiving, checking and signing off roll returns will be taking place in 2007. All of these developments will be done in parallel with the standard process.

Some **schools will be invited to participate** in a pilot of this new process during July 2007. If you are keen to participate in these new processes please contact school.returns@minedu.govt.nz

Electronic data collections

Schools that use an SMS for roll returns can send their .moe file to us electronically. This file is then used for the school Decile Reassessment as it has student addresses in it and also for the bulk upload of students into ENROL for you.

Decile Reassessment

Introduction

School deciles are reassessed following each census. The reassessment will take place in 2007 and for this the home addresses of students need to be sent to the Ministry immediately after the manual March roll return.

To make this process as easy as possible, the Ministry has asked SMS (Student Management System) software developers to include student addresses in the data file that is generated at roll return time (called the .MOE file). For most schools this .MOE file will be sent electronically to the Ministry.

Schools using an SMS

The process for sending the .MOE file to the Ministry electronically will depend on which Student Management System schools are using.

More information about how to send the files to the Ministry will be sent to you in November 2006.

Schools not using an SMS

These schools will receive an Excel form to complete part of which includes adding students home addresses and to send back electronically to the Ministry.

More information about how to send the files to the Ministry will be sent to you in November 2006.

ENROL – the student enrolment system

Schools not currently using ENROL During 2007 primary schools will begin to use ENROL. All of the information and training you will need for this will be provided to you by the ENROL project team.

Schools currently using ENROL In 2007 Intermediate schools will have a new intake of year 7 students. As planned, the information about these new students will be loaded into ENROL using the .MOE data file generated by the SMS at the March roll return time.

This .MOE file will be sent electronically to the Ministry and will serve the **dual purpose** of providing the student addresses for decile reassessment and the data for ENROL.

The process for sending the .MOE file to the Ministry electronically will depend on which Student Management System schools are using. More information about how to send the files to the Ministry will be sent to you in November 2006.

What is new for 2007 roll returns?

Exchange students Schools using a Student Management System (SMS) will be able to record within their SMS which type of approved exchange scheme each foreign exchange student belongs to.

Previously this was reported manually on the roll returns in the overseas students question.

Māori Language roll predictions From 2007, schools will no longer need to state the number of predicted **Māori** students included in the total at each level, you just state the total numbers for each levels of Māori language learning (Levels 1–4b).

Citizenship Schools are now asked to collect Citizenship for domestic students as well as international students. The codes used have been updated to list only countries who issue passports. You can find a complete list at www.minedu.govt.nz/goto/schoolrollreturns

Insert C This will not be sent out in the March Roll Return for 2007 as the Triennial Board of Trustees elections are happening at this time.

NZAID-funded students (FE) Dependant children of a NZAID scholarship holder sponsored by the New Zealand Agency for International Development (NZAID) are to be treated as International students when enrolling at a New Zealand school.

Completing your roll return

Roll Count day and Due dates

March Count Day **1st March**

The roll return form is due with the Data Management Unit by Monday the 12th of March.

July Count Day **27th June**

The roll return form is due with the Data Management Unit by Monday the 9th of July.

Collecting, storing and checking your data

Prepare your data early

Please prepare your roll return data well ahead of the count date (1 March or 27 June). You will need to:

- Collect the student enrolment and other data items as detailed in the Student and School records section
- Enter/store this information on your school's Student Management System (SMS) if you use one, or in whatever record management system your school uses, if not an SMS
- Check carefully that the data has been correctly entered into your system
- Determine which students should be counted in which parts of your roll returns.

When to expect your roll return package

- Mail-out dates**
- March roll return package in the second week of February
 - July roll return package in the second week of June.

If you do not receive your package by the 3rd week you should get in touch with the Data Management Unit or print a form out online (contact details and links given in the Contact details and links section of this booklet, on page [37](#)).

Contents of package	March	July
Covering letter , setting out what action your school needs to take by when, together with some general information	✓	✓
A blank roll return form : <ul style="list-style-type: none"> • To be completed and returned to the Ministry • Take a photocopy of the form – with identical information – and keep for your school records 	✓	✓
Insert C – Board of Trustees Membership For state and state integrated schools only	X	✓
Insert E – Loss of Permanently-appointed Teachers For state and state integrated schools only	X	✓
Any other information that might be of use to you in completing your roll return	✓	✓
Pre-paid reply envelope	✓	✓

What to do when you receive your roll return package

- Read all the information**
- Before beginning to complete your roll return, please **read all** the information provided in:
- This booklet
 - The roll return covering letter
 - The introductory notes included at the front of your roll return form
 - The instructions provided with each question.

- Principals who delegate the completion of roll returns**
- Either school principals personally complete the March and July roll returns or they choose to delegate the responsibility for completing them to members of their staff.

Principals who delegate to staff please pass the **complete roll returns package**, along with this booklet, onto the staff member responsible for completing the returns.

Please note, however, that the **principal is still responsible** for checking the accuracy of the completed form. See ‘Verification and sign-off’ on page [10](#).

Counting students

Fundamental rule	The fundamental requirement for a student to be included on a roll return is that s/he must be enrolled and attending the school for tuition on the date of the roll count.
You may also include	<p>You may also count on your roll return students in the following situations:</p> <ul style="list-style-type: none">• Students who, for medical or domestic reasons, are absent on the date of the roll count, but only if the school has:<ul style="list-style-type: none">– a medical statement– a statement from a social worker or counsellor– a letter from the parent/guardian justifying the student’s absence from school• Students suspended for a specified period on the date of the roll count• Students attending an activity centre, health camp, hospital school, or CYFS residential home on the date of the roll count• Students who are temporarily overseas, provided that the school has documentary evidence of their intention to return to the school, and that their absence does not exceed 15 consecutive weeks in the current school year.
Others you may include	<ul style="list-style-type: none">• Students who attend more than one school are to be counted on the roll of the school where the majority of instruction occurs. Boards of Trustees may exchange funds to compensate for the time a student spends at another school• Students who are home-schooled should not be included on roll returns.
Schools using an SMS	To ensure that students who do not fit the criteria for inclusion in the roll count are not counted, school administrators must select ‘Not Attending’ (NA) for the student type in their SMS.
For further information	Circular 1998/48 dated 30 November 1998 is still relevant and has full details on counting students. It can be accessed on the Education Counts website: www.educationcounts.edcentre.govt.nz/goto/guidelines

Using a computerised Student Management System

Creating the MOE file

Run through the steps required by your SMS to create the text-file (.MOE file) from which the roll return tables and print-outs will be generated.

This includes 'cleaning up' any errors in individual student enrolment data.

Checking for accuracy

- Before including them in the roll return to be sent back to the Ministry, computer-generated tables must still be checked for:
 - accuracy
 - completeness
 - readability
- The tables must also be checked to ensure they accurately reflect the position at the school on roll count dates
- Particular attention must be paid to ensure consistency of data between the different tables where consistency is required
- Complete and check the remaining questions not covered by SMS tables, that have to be completed manually
- Please check that:
 - where a table consists of two pages, both pages are included
 - tables are printed in landscape format
 - totals are showing on the right-hand side of the page (you may need to adjust your margins before printing).

Note: Please **do not** staple or glue the SMS tables to the individual pages of the roll return. Simply staple all the tables together, and insert them into the return envelope with the roll return form and relevant inserts.

Manually completed questions

March data items that are collected manually:

- Peak rolls
- Teaching staff at private schools
- Teacher vacancies in state schools
- Off-site classes or units (Intermediate only).

July data items that are collected manually:

- Language learning below Year 9
- Predicted rolls for the following year
- Off-site classes or units (Primary only).

Not using a computerised Student Management System

Completing the roll return by hand

- Complete each roll return question manually, checking for:
 - accuracy
 - completeness
 - readability
 - The data given in each question should also be checked to ensure it accurately reflects the position at the school on the roll count dates
 - Particular attention should be paid to **consistency of data between the different tables** where consistency is required
 - Please ensure that row and column totals within each table have been calculated correctly.
-

Inconsistency between tables

Data Management Unit staff spend a great deal of time with schools that have not completed their roll returns accurately.

In particular, we receive a large number of roll returns where:

- There are mis-matches between data in one roll return table and another
- The totals in each row and each column have been added up incorrectly (or not added up at all).

Please ensure you have checked that the correct tables agree before posting.

Verification and sign-off

Verification and sign-off

- All completed roll returns and Inserts must be **verified** and **signed** off by:
 - the Principal; **and**
 - the Board of Trustees chairperson (where relevant)
- State and state integrated schools must check and amend as required their Insert C (July)
- State and state integrated schools must complete their Insert E (July)
- The verified and signed roll returns and Inserts must be returned to the Data Management Unit by the due date (12 March 2007 and 9 July 2007 respectively) using the pre-paid reply envelopes provided.

Student Enrolment Policy

Domestic and International student enrolment policy

Definition of Domestic student

A domestic student is defined in the Education Act 1989. The definition includes persons who are:

- New Zealand citizens (including those born in the Cook Islands, Tokelau or Niue)
 - New Zealand permanent residents
 - Citizens of Australia residing in New Zealand
 - Dependent children of:
 - Diplomatic staff
 - Refugees
 - Persons with New Zealand work permits
 - Persons with Commonwealth scholarships
 - Foreign Exchange student
 - Any International student who is enrolled in any Doctor of Philosophy (PhD) programme at a New Zealand University.
-

Definition of International student

An international student is any student enrolled in a New Zealand school who is not a domestic student. This will leave the following three categories:

- International fee-paying students
- NZAID-funded students
- Students on a government-approved exchange scheme.

Note that exchange students do not pay fees, and NZAID students' fees are paid by NZAID.

Citizenship, residency and student visa documentation

To ensure that students are correctly identified as either domestic or international students, schools need to check the citizenship, residency, diplomatic or student visa status of all students when they enrol. Schools are advised to attach documentation confirming students' citizenship, residency or student visa status to their enrolment forms.

The following documents are suitable for confirming a student's status:

- Birth Certificate
- Passport with details of the student's residency status or a valid student visa
- Immigration Service documentation of refugee status
- Certificate of Naturalisation.

We advise you to take a photocopy of the original document and certify it to say that it is a true copy instead of keeping uncertified photocopies.

Student and School Records

Purpose This chapter deals with information that is required for roll return purposes about your current students, and about students who leave your school. It also includes school records about Board of Trustees, Teachers, School Rolls and off-site units.

If your school does not use a computerised SMS, you will need to obtain the relevant data and find other ways to store the information and retrieve it when required for the roll returns.

Enrolment forms The easiest way for your school to collect most of the required student data is through your enrolment forms.

These should be designed so that you can collect the information required for roll returns purposes when a student enrolls at your school, alongside any other data your school might need.

The student data required for roll returns are set out on the next page.

Common Issues

Introduction Below is a list of the most common mistakes schools make.

ECE participation of year 1 students	Many primary schools don't appear to collect previous ECE attendance from all year 1 new entrants on their Enrolment form. Refer to pg 15
International Students' tuition weeks	We have found that schools often leave the tuition weeks defaulted to 39 or 40 weeks, for a particular student the school then alters the tuition fees according to the time the student is at the school but forget to alter the number of weeks. Refer to pg 33
Predicted rolls	Don't forget to complete the predicted rolls question. This is a manually completed question and many schools with an SMS forgot to complete this. Refer to pg 29
Mismatch in tables	Schools that complete the returns manually often have mismatches in the sub-totals and totals for females and males from one table to the next. Please ensure that all the tables agree as per the instructions at the beginning of the form.

Student data required for roll return purposes

Data required for roll returns To be able to complete your roll return, your school must collect the enrolment data listed below for each student. The data items are listed below in **alphabetical order**. For schools using a computerised Student Management System (SMS), please note this data will reflect the data entry fields in your SMS.

The data items are described in more detail in the following pages.

Student Information	See Page
Country of citizenship	14
Date of birth	14
Early Childhood Education Participation (Y1 only)	15
Enrol date	14
Ethnicity (up to three ethnic groups)	16
Full-time Equivalent (FTE)	18
Gender	18
Iwi affiliation	19
Language Learning	22
Leaving date	22
Māori Language Learning	23
MOE Year Level	25
ORRS status	27
Pacific-medium – Language and Level	28
Previous school	30
Reason for leaving	30
School ID	31
Start date	14
Student ID	31
Student name	31
Tuition Fee (for FFP and NZAID-funded)	32
Tuition weeks (for FFP and NZAID-funded)	33
Type of student	33
Zoning status (if applicable)	36

Country of citizenship

What we collect From 2007, we are asking schools to collect citizenship for all students, not just international students. This information is captured in your SMS if you use one. The second step in this process is to determine if a student is a domestic or international student.

Codes A list of country of citizenship codes can be obtained from the Ministry of Education website www.minedu.govt.nz/goto/schoolrollreturns

Warning Do not confuse country of citizenship with ethnicity.

Country of citizenship relates to a student's nationality and the country of which s/he holds a passport, whether the student was born into that nationality or whether it was adopted at some later date. It may be, but does not necessarily have to be, the same as the country of origin, or the country of birth.

Dates (DoB, Start date, Enrol date)

Date of birth This is the date of birth as listed on the student's passport or birth certificate.

Start date This is the date the student first started attending **any** school. For the majority of students this is between their fifth and sixth birthdays.

This date is used to determine the correct MOE Year Level for primary students and therefore must be recorded even if the student first started schooling at a different school.

Where the start date is unknown (e.g. for refugee children or students who have been home-schooled), the date of the student's sixth birthday should be entered.

Start date applies to students up to Year 8. It is not compulsory for secondary school students.

Enrol date This is the date of first attendance at **your** school.

There are two scenarios:

- A student may be enrolled some time before he/she begins attending the school
- A student may have transferred to your school from another school.

The enrol date to be recorded on the student's record is the date of **first attendance for tuition** at your school. This will help to ensure that only those eligible are counted on the roll returns.

Early Childhood Education participation (for Year 1 students)

Why do we collect this?

This information is used to measure the participation of children in Early Childhood Education services.

The data provided in this question is critical to the Ministry's early childhood education team. There is no other source of data that can provide ECE participation as accurately as this for ethnic groups. Other methods rely on population estimates for ethnic groups between census years, which are not reliable. Your efforts to collect this information are greatly appreciated.

Enrolment form

School administrators need to identify whether or not Year 1 students attended any form of Early Childhood Education (ECE) on a regular basis immediately before starting school.

This information should be included on enrolment forms for:

- New entrants; and
- Year 1 students transferring from another school.

All children are to be allocated to one of the following categories:

- Attended Kindergarten, Playcentre, Education and Care or Home-based Service (including the ECE in the Correspondence School)
- Attended Kohanga Reo
- Attended Playgroup or Pacific Island EC Group
- Attended ECE but type unknown
- Did not attend any type of ECE Centre or Service.

The one remaining category 'Unable to establish whether ECE attended or not' should be used only very rarely, for example in cases of fostered children, or where caregivers do not speak English.

Ethnicity

Why do we collect this?

This information is used to monitor the participation, retention and achievement of different ethnic groups in the New Zealand population.

Definition

Statistics New Zealand defines Ethnicity as “the ethnic group or groups that people identify with or feel they belong to. Ethnicity is a measure of cultural affiliation, as opposed to race, ancestry, nationality or citizenship. Thus, ethnicity is self-perceived and people can affiliate with more than one ethnic group.”

School enrolment forms should allow for students to self-identify or to be identified by their parents/guardians as belonging to up to three ethnic groups.

Changes to the codes

Codes for ethnicity have changed from alpha codes to numeric codes in 2006. These changes were implemented to align Ministry codes with Statistics NZ codes.

Schools may not notice the difference in their SMS because they may not see the codes when they enter data.

The ethnicity codes are listed in the table on the next page.

Warning

Do not confuse ethnicity with country of citizenship.

Ethnic groups for roll returns

To translate ethnicity to an ethnic group for specific tables in the roll returns, use the table on the next page. The examples below illustrate.

Example 1: A student who has identified with the groups Indian (431) and British/Irish (121) should be coded as both on their individual student record. S/he would be reported as Indian in tables J5, J6 and J8 but as a leaver s/he would be reported in SL1 and SL2 in the Asian group.

Example 2: A student who has identified with groups NZ Māori (211) and NZ European/Pākehā (111) should be coded as both on their individual student record. S/he would be reported as NZ Māori in all tables requiring ethnicity.

Example 3: A student who has identified with the groups NZ European/Pākehā (111) and Samoan (311) should be coded as both on their individual student record. S/he would be reported as Samoan in all tables requiring ethnicity except the School Leaver tables (SL1 and SL2). When the student leaves school s/he should be reported as Pasifika/Pacific Island group.

Continued on next page

Ethnicity, continued

Ethnic group for roll returns For the purposes of the roll returns, students must be reported in one ethnic group only. The Ministry uses the same system of priority reporting that has been used by Statistics New Zealand.

To determine which ethnic group to report for a particular student, **start at the top** of the ethnicity list below and use the first ethnicity that applies to this student, then look to the right-hand columns for the ethnic group for the relevant roll return tables.

Note: The SL tables (third column) refer to secondary-aged school leavers.

Code or meaning on student's enrolment form or record		Report students in one group only	Report students in one group only
Code	Ethnicity list	Ethnic group Tables: J5, J6, J7	Ethnic group Tables: SL1, SLA, SL2
211	Māori	Māori	Māori
351	Tokelauan	Tokelauan	Pacific Peoples
361	Fijian	Fijian	
341	Niuean	Niuean	
331	Tongan	Tongan	
321	Cook Island Māori	Cook Island Māori	
311	Samoan	Samoan	
371	Other Pacific Peoples	Other Pacific Peoples	
411	Filipino	Southeast Asian	
412	Cambodian		
413	Vietnamese		
414	Other Southeast Asian		
431	Indian	Indian	
421	Chinese	Chinese	
441	Sri Lankan	Other Asian	
442	Japanese		
443	Korean		
444	Other Asian		
511	Middle Eastern	Other (e.g. South American, African)	Other
521	Latin American		
531	African		
611	Other ethnicity		
999	Not stated		
128	Australian	Other European	NZ European/Pākehā/ Other European
121	British /Irish		
127	German		
122	Dutch		
123	Greek		
124	Polish		
125	South Slav		
126	Italian		
129	Other European		
111	NZ European/Pākehā	NZ European/Pākehā	

Full-time Equivalent (FTE)

What is FTE? The FTE field is used to determine a student's attendance status, i.e. whether the student is reported as full-time or part-time. Resourcing of schools is based on the full-time equivalent roll count.

All students in Years 1–8 and all students aged under 16 in Year 9 or above must be counted as one full-time equivalent student (i.e. have a FTE = 1.0). SMSs should default these students to full-time. Part-time students must be 16 years of age or older.

Gender

Gender A student is identified as male or female.

Insert C – Board of Trustees

Why do we collect this? Information on Board of Trustees membership is collected **from state and state integrated schools only**, via a form called the Insert C.

The name and contact details of the chairperson of the Board of Trustees are made available via the Ministry of Education website.

It is also used to obtain statistics about the composition of boards, for example, the proportions of men and women or representation of various ethnic groups.

Format of the Insert C Your pre-populated Insert C will be provided only in the July roll return in 2007, as triennial Elections are being held at the beginning of the year.

It will give details (names, title, gender, board position, member type, ethnicity and, for the chairperson, contact details) for each member of your Board of Trustees – according to the latest information held by the Ministry.

Checking your BOT details When checking your Board of Trustees details please:

- Ensure full and correct details for all current (at roll count dates) board members are included. Specifically we need: gender and ethnicity details, board positions, board member types and start dates
- Cross out the names of former trustees who are no longer members of the Board on roll count dates
- Ensure that there is only one of each of the following on each Board of Trustees:
 - Principal (or Acting Principal)
 - Staff representative
 - Student representative
 - Chairperson (or Acting Chairperson).

Insert E – Teacher losses

Why do we collect this? Insert E collects information on the reasons for teacher losses **from state and state integrated schools only**.

This information is used in teacher supply work and to identify trends and patterns of employment in the teaching workforce.

Format of the Insert E The Insert E lists **permanently-appointed** teachers who were on the staff of the school at the pay period in May of the previous year and who have subsequently left the state teaching service.

Teachers on leave without pay during this pay period are also included as teacher losses.

Completing the Insert E Schools are asked to enter the reason that best describes the reason for each teacher leaving. A list of reasons and their codes is provided on the Insert E.

There is no need to add the names of teachers who may have left this school but remain in the state teaching service.

Iwi affiliation

Why do we collect this? Iwi authorities and runanga are increasingly interested in the educational participation and achievement of their children. Collecting Iwi affiliation information allows Iwi, schools and the Ministry to understand the current opportunities and challenges and to focus effort in the areas of greatest need.

While neither the March nor July roll returns include a specific question about Iwi affiliation, the Data Management Unit has collected the data, via alternative collection vehicles, from a number of schools across the country. Where available, that data has proved a rich source of information for the Ministry and Iwi. We hope the richness will improve over time as more and more data becomes available about more and more students.

You can find more detailed information about the collection of Iwi affiliation data on the Ministry of Education website www.minedu.govt.nz under Māori Education, Research and Statistics.

Background We asked schools to start recording student Iwi affiliations for the first time in 2003. Specifically, we asked all schools with computerised SMSs to record up to three Iwi affiliations for students enrolling from the beginning of 2003, including any who transferred in from other schools.

The position for 2007 remains the same as for 2003 – i.e. there is no specific Iwi affiliation question on either of the 2007 roll returns. But in 2007, as in 2003, it is likely we will be collecting the data from (selected) schools via alternative means – usually through collecting the SMS-generated file of individual student data. Therefore, we ask that you **continue** recording this information in your SMSs for all students who have enrolled in your school since January 2003.

Iwi affiliation, continued

What should be recorded? Iwi affiliation is based on ancestry. Some people will have an Iwi affiliation but, for various reasons, feel unable to identify as Māori. It is important therefore that the opportunity to identify Iwi affiliations is provided for **all** students – Māori and non-Māori alike.

If you have not already done so, you will need to modify your school's enrolment form to include a write-in question asking for Iwi affiliations of all students, as in the example below:

Does the student have an affiliation with an(y) Iwi?	If 'YES' please complete details below
<p>Please enter the name(s) of the student's Iwi where the student identifies as belonging to one or more Iwi.</p> <p>Up to three Iwi affiliations may be entered for the student.</p> <p>If the student has an Iwi affiliation, but does not know the name of their Iwi, please enter 'Don't know'.</p>	<p>Iwi: Rohe (Iwi home area):</p> <p>Iwi: Rohe (Iwi home area):</p> <p>Iwi: Rohe (Iwi home area):</p>

Iwi affiliation reference card

As part of the July 2006 roll return package, the Data Management Unit provided all schools, for reference purposes, with a laminated sheet listing the Statistics New Zealand standard classification of Iwi and their codes. The classification is also available on the Ministry of Education website www.minedu.govt.nz/goto/schoolrollreturns

School administrators in schools with computerised SMSs will need to translate the Iwi affiliations given in words on students' enrolment forms into the codes given in the Statistics New Zealand standard classification. Administrators should enter the appropriate codes for each student into their SMSs.

If you would like further copies of the Iwi reference card, or have any queries about the collection or coding of Iwi data, please send an email to iwi.data@minedu.govt.nz for assistance.

Kura Teina Supplementary forms

Kura Tuakana Composite schools which are Kura Tuakana to one or more Kura Teina will receive supplementary forms for each of their Kura Teina in their roll return packages, in both March and July.

Time line

- The principal of the Kura Tuakana must forward the supplementary forms to the Kura Teina immediately upon receiving the roll return package
- The Kura Teina must then complete the supplementary form and send it back to the Kura Tuakana by 5 March 2007 or 2 July 2007 respectively
- The principal and Board of Trustees' chairperson must check and sign the supplementary form before returning it to the Ministry of Education, along with the Kura Tuakana form, by the due date (12 March or 9 July 2007).

Completing the supplementary form

Students at the Kura Teina must **not** be included on the Kura Tuakana form. The questions about students in the supplementary form for Kura Teina are the same as in the Kura Tuakana form. The Māori-medium education table in the Kura Teina's supplementary form provides one row for each level.

Verification and sign-off

The supplementary forms for Kura Teina must be:

- Completed and signed by the head teacher of the Kura Teina
- Checked and signed by the principal of the Kura Tuakana
- Checked and signed by the chairperson of the Kura Tuakana Board of Trustees.

Language learning below Year 9

What is collected?

This question collects data on the numbers of students at primary year levels who receive language tuition (other than English or Te Reo Māori) at any time during the school year.

If a language is taught on a rotational basis (e.g. term by term), schools are asked to estimate the **total** number of students in each category who will receive language instruction during the school year.

Languages

Information is collected about the following languages:

Samoan	French
Cook Island Māori	German
Tongan	Japanese
Niuean	Spanish
Fijian	Russian
Tokelauan	Chinese languages
Other Pacific languages	Indonesian
	Other languages

Note: Do not include students learning Pacific languages if they have already been counted in the Pacific-medium question.

Levels of language learning

Years 1–6 students are counted together, and Years 7–8 students are counted together.

Within these two groups the categories are:

- Less than 15 hours per year
 - 15 to 30 hours per year
 - More than 30 hours per year.
-

Leaving date

Leaving date

When a student leaves your school, the date of last attendance for tuition is to be recorded either through your SMS (if your school uses one for roll return purposes) or other record management system.

Māori Language Learning

Māori Language Learning

This records the **highest** level of Māori language learning for each student involved. This information is used for the resourcing of Māori language and immersion programmes and to measure participation in these programmes. Schools receive funding for students in Levels 1–4b.

Listed below are the categories that appear in the roll return. One of these categories must be allocated to each student involved in Māori language learning. Please make sure you **update the data for each student before each roll collection** to capture the correct level at which students are learning. This is particularly important for students changing levels between March and July.

Māori language learning

Māori language learning has three degrees of involvement:

- Māori-medium – curriculum is delivered in Māori (i.e. curriculum subjects are taught in Māori)
- Te Reo Māori – as a separate subject
- Taha Māori.

Within these degrees there are six levels, which must be reported on roll returns. They are described below.

Māori-medium

The whole curriculum is delivered either:

- In Māori only (immersion); or
- In both Māori and English (bilingual).

This covers four levels.

Level	Curriculum is taught in Māori
1	100% of time, i.e. complete immersion (25 hours per week); or 81– 100% of total time, i.e. for more than 20 and up to 24.75 hours per week
2	51– 80% of total time, i.e. for more than 12.5 and up to 20 hours per week
3	31–50% of total time, i.e. for more than 7.5 and up to 12.5 hours per week
4a	12%–30% of total time, for more than 3 and up to 7.5 hours per week (i.e. more than 70% of instruction is in English).

Continued on next page

Māori Language Learning, continued

Te Reo Māori Students learn Māori language as a separate subject.

This covers two levels.

Level	Te Reo Māori is taught as a separate subject for:
4b	At least 3 hours per week
5	Less than 3 hours per week

Some schools that offer Te Reo Māori as a separate subject have a policy of rotating students through the Te Reo Māori programme – perhaps for a term at a time. In such cases, the roll return should record only the number of students involved in the programme on roll count date (1 March 2007 and 27 June 2007), not the total number of students involved in the programme for the whole year.

Taha Māori Students learn Māori songs, greetings and simple words.

This covers just one level.

Level	Description
6	Māori songs, greetings and simple words

Extra category in SMSs For schools using computerised SMSs, your SMS should have an additional category for students who are not involved in any Māori language learning.

Important The Māori-medium education table in the roll returns provides two rows for each level:

- The first row should contain the **total** number of students (Māori and non-Māori) involved in that level of Māori language learning.
- The second row should contain the number of **Māori students included** in the row above.

Even if all your students are Māori, and all are involved in Māori-medium education, you still complete the second row in each level.

Funding for Māori-medium in 2007

Funding for Māori-medium and Te Reo Māori programmes has changed.

From 2006, **all** students who are enrolled in Māori-medium education will receive funding, not just Māori students.

This funding is adjusted when the actual numbers of students in these programmes become available from the next March return.

Please refer to Education Circular 2005/18. This can be accessed on the Ministry's website: www.minedu.govt.nz/goto/circulars

MOE Year Level (previously Year of Schooling)

Name change In the past there has been confusion between:

- Year of Schooling as required for roll returns; and
- Year of Schooling as a way of allocating a class or academic level for a student within the school.

To prevent further confusion, year levels in the roll return context will be known as **MOE Year Level**.

Definition MOE Year level measures **the number of years of schooling a student has received**. It provides the Ministry of Education with a method of counting students for resourcing purposes which is independent of the way schools are organised or the particular programme of study that a student may be undertaking.

What it is not MOE Year Level is **not** a measure of a student’s academic level. Where a student fits academically is at the principal’s discretion.

Thus a student’s academic Year of Schooling may be different from his/her MOE Year Level.

To calculate MOE Year Level MOE Year Level for most students is **based on the date they first ever began schooling**. This is their **Start** date (Refer to page [14](#)).

Follow these steps to determine a student’s MOE Year Level.

Step	Action						
1	Check the student’s Start date – i.e. the date s/he started school for the very first time.						
2	Use this date to calculate the MOE Year Level. <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>If ..</th> <th>Then MOE Year is</th> </tr> </thead> <tbody> <tr> <td>Start date is on or before 1 July</td> <td>1</td> </tr> <tr> <td>Start date is after 1 July</td> <td>0</td> </tr> </tbody> </table>	If ..	Then MOE Year is	Start date is on or before 1 July	1	Start date is after 1 July	0
If ..	Then MOE Year is						
Start date is on or before 1 July	1						
Start date is after 1 July	0						
3	The student retains this MOE Year for the rest of the calendar year.						
4	In January of the next year every student’s MOE Year increases by one.						

Misconceptions MOE Year Level is **not** based on:

- A student’s fifth birthday. Students may start school at any time between their fifth and sixth birthdays
- A school’s internal system of promoting students to the next academic level in April or May
- A student’s academic level, even if s/he has been accelerated or held back for whatever reason.

Continued on next page

MOE Year Level, continued

Examples of MOE Year Level calculation

Example 1: Tim started school for the first time on 15 May 2005. His MOE Year was Year 1 for the rest of 2005. In January 2006 he went up to Year 2. In all of 2007 he will be in Year 3.

Example 2: Aroha started school for the first time on 2 July 2005. Her MOE Year was Year 0 for the rest of 2005. In January 2006 she went up to Year 1. In all of 2007 she will be in Year 2.

Example 3: Susan transferred to this school from another school on 10 August 2006. Her **start** date (at her previous school) was 5 June 2004. Therefore in 2007 her MOE Year is Year 4, having started school for the very first time as a Year 1 in 2004.

Example of incorrect calculation: Susan (above) started at this school on 10 August 2005. If using her **enrol** date (at this school) instead of her **start** date (at her previous school), she would register as MOE Year Level 1 in 2006. This is not correct.

How SMSs calculate MOE Year Level

SMSs calculate a student's MOE Year from the **Start** date entered for this student.

When entering this information for students who have transferred from other schools, administrators must take care to enter the correct date in that field – i.e. the date the student started school for the first time (at the other school), not the first date of attendance at this school.

Entering the wrong date will result in the SMS reporting the student in the wrong MOE Year.

Students starting school after age six

Students who start school after the compulsory starting age of six, such as migrant children and children, who have been home-schooled, will be given the same MOE Year Level as the majority of students of the same age.

Re-setting MOE Year Level

The MOE Year Level for a student may be **re-set** at Year 7, Year 8 and Year 9 levels **only**.

- Students in their final two years of primary and intermediate schooling (Form 1 and Form 2) must have their MOE Year level set at Year 7 and Year 8 in order to generate appropriate funding and staffing for technology
- All students in their first year of secondary schooling will be classified in Year 9.

Off-site classes and units

What is collected?	<p>This question applies to State and State Integrated schools only.</p> <p>Schools are asked to list any Activity Centres, Off-site Learning Centre, Off-Site Classes or Special Purpose Units for which their Board of Trustees had responsibility, along with the numbers of students attending them by gender.</p> <p>Off-site Learning Centres are:</p> <ul style="list-style-type: none">• Separately funded from the MOE• Education is provided in an adapted location separate from mainstream classes• Students remain on the roll of a mainstream school and are expected to return to this school.
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ORRS Status

Definition	<p>ORRS describes the level of resourcing for special needs students identified in the Ongoing and Reviewable Resourcing Schemes (ORRS).</p> <p>It is recorded on your SMS as N, H or V (Non-ORRS, High needs, Very high needs).</p>
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What is it used for?	<p>Although this data is not currently collected on roll returns, it remains a requirement for school SMSs so that this information can be recorded for a school's own purposes.</p>
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ORRS students older than 14	<p>Special needs students are entitled to attend primary schools until the end of the year in which they turn 21.</p> <p>In the past this has caused difficulties for schools preparing their roll return tables by SMS.</p> <p>From 2006, if special needs students have their ORRS status recorded (as H or V), this will ensure that they can be included on the SMS roll return tables, without causing an error message.</p> <p>Note: It would be helpful to Data Management staff, if a note could be added to the SMS table indicating that these older students are ORRS students.</p>
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Pacific-medium – Language and Level

Definition In Pacific-medium education the curriculum is delivered either:

- in a specified Pacific language only (immersion); or
- in both a specified Pacific language and English (bilingual).

Why do we collect this? Data on the numbers of students involved in Pacific-medium education is used to measure the extent to which Pacific-medium education is being provided in schools. This assists in policy development work.

Pacific languages Pacific languages for which data is collected are:

- Cook Island Māori
- Fijian
- Niuean
- Samoan
- Tokelauan
- Tongan
- Other Pacific languages.

Pacific-medium education Pacific-medium education may be reported at four levels. Students must be reported **once** only, at the **highest** level of learning.

Level	Curriculum is taught in the specified Pacific language:
1	81–100% of total time, i.e. for more than 20 and up to 25 hours per week
2	51–80% of total time, i.e. for more than 12.5 and up to 20 hours per week
3	31–50% of total time, i.e. for more than 7.5 and up to 12.5 hours per week
4	12–30% of total time, for more than 3 and up to 7.5 hours per week (i.e. more than 70% of instruction is in English)

Extra level in SMSs The SMSs allow for an extra level for students not involved in Pacific-medium education.

Peak rolls

What is collected?	<p>This question applies to state and state integrated schools only.</p> <p>It collects information on the peak roll for the previous year and the month in which this peak roll was reached.</p> <p>Schools are also asked to estimate their peak rolls for the current year and the next two years.</p>
Why do we collect this?	<p>Peak roll data assists in planning and resourcing for schools, particularly in property provision.</p>

Predicted rolls

Why do we collect this?	<p>Schools are asked to predict the number of students they will have in the following year.</p> <p>The Ministry of Education uses predicted rolls to calculate the first instalment of the funding entitlement for the year.</p> <p>The school's predictions are taken into consideration when the provisional staffing roll is established. The Guaranteed Minimum Funded Staffing (GMFS) for the coming year is calculated from the provisional staffing roll.</p> <p>Predicted rolls are also used in future planning and forecasting.</p>
Primary schools	<p>Primary schools are asked to predict their regular student rolls for the next July and to estimate their July rolls for the following two years.</p>
Intermediate schools	<p>Intermediate schools are asked to predict their regular student rolls for the next March and to estimate their March rolls for the following two years.</p>
Māori language predictions	<p>The July roll return also collects predictions of the numbers of students in Māori-medium education or learning Te Reo Māori for three or more hours per week (i.e. Levels 1–4) for the following July (primary schools) and for the following March (intermediate schools).</p> <p>You no longer need to state the number of Māori students included in the total at each level, you just state the total numbers for each level.</p>

Previous School

Why do we collect this? This information is used to assist in determining the catchment area of a school. This is used in projecting rolls and in property planning.

Intermediate schools only This information is asked for in the March roll return for intermediate schools only.

This data is required for Regular Year 7 students.

This data is not required for NZAID and FFP students.

School numbers Schools completing this question manually must include the MOE number of the relevant schools.

A list of school numbers and names can be obtained from the Ministry of Education website, www.minedu.govt.nz/goto/schoolrollreturns

Reason for Leaving

Purpose Reason for Leaving applies mainly to secondary-aged students, but primary and intermediate schools with SMSs will need to enter this information on their students' records when they leave.

The reason must be from one of the following.

Note: Codes L, E and U apply to secondary-aged students only.

Code	Description
S	Transferred to another school in New Zealand
O	Left to go or return overseas
D	Deceased
L	Left school (i.e. to seek employment or for post-school education and training)
E	Granted early exemption to leave school (applies to those under 16 years)
U	Student under the age of 16 whose destination is unknown
X	Expulsion or exclusion
H	Transferred to home-schooling

School ID

School ID Ministry of Education school number.

Student ID Number

Definition This is a number allocated to a student by a computerised Student Management System (SMS).

Student Name

Student Name The legal surname and first name as specified on their birth certificate or passport are essential.

Teaching staff at private schools

What is collected? Data about numbers of full-time and part-time teaching staff at private schools.

Why do we collect this? This information, together with data from the teachers' payroll (in state schools), gives a fuller picture of total teacher numbers and full-time teacher equivalents employed in New Zealand schools.

Teacher vacancies in state schools

What is collected? This question applies to state and state integrated schools only. It collects:

- The number and type of vacancies for **full-time permanent teachers**
- How many vacancies have had to be re-advertised
- How many of these the Board of Trustees is **actively seeking to fill**.

Note: A board would not be considered to be 'actively seeking to fill' a position that is not currently being advertised because it is satisfactorily filled by a limited-term appointee.

Why do we collect this? This information is used to indicate trends in staffing difficulties and inform analysis of teacher supply issues in state and state integrated schools. For example, it may identify particular geographic or subject areas in which there is a shortage of suitable teachers.

Tuition Fee (for FFP and NZAID-funded)

Why do we collect this?

This information will be used to calculate the Export Education Levy for foreign fee-paying students.

What is to be reported?

- In the Overseas Students question in both the March and July roll returns, schools must report tuition fees charged (including GST) for **this academic year** (i.e. 7 February 2007 to 18 December 2007)
 - The fee charged for tuition is required for foreign fee-paying and NZAID students
 - The fee to be reported is the amount charged for the academic year (or proportion of the year for which the student is enrolled), **not** just that portion of the fee that has been paid to date; i.e. for students paying term by term, this means the liable fee for their expected enrolment period in the 2007 academic year, even though they may have yet to pay the total fee
 - For students enrolling over more than one academic year, the tuition fee must be divided proportionately into each academic year and the 2007 portion only reported on the 2007 returns
 - Schools providing scholarships to International students must still report the full tuition costs so that the Ministry can calculate the Export Education Levy correctly
 - The amount must be entered in New Zealand dollars.
-

Export Education Levy

The Export Education Levy is payable for all foreign fee-paying students studying in New Zealand.

The Export Education Levy is deducted from the Operations Grants of state integrated schools, and from the Subsidy Grants of fully registered private schools.

State schools do not make any additional payment for the Export Education Levy because it is deducted by the Ministry from the International Student Levy paid by these schools.

For further information on the International Student Levy and the Export Education Levy, please refer to the *Funding, Staffing and Allowances Handbook*, which is available on the Ministry's website at <http://www.minedu.govt/goto/resourcinghandbook>

Tuition weeks (for FFP and NZAID-funded)

Tuition weeks This applies to foreign fee-paying students and NZAID funded students. From 2006, the roll returns will collect the number of weeks an International student is enrolled for. This will allow for the exact deduction of the International Student Levy.

Why do we collect this? Tuition weeks is used to calculate the International Student levy for state schools. The levy is calculated by multiplying the number of weeks by \$22.50 for Primary and Intermediate schools. Tuition weeks is also used to calculate the fulltime equivalent of international students for school types.

The maximum number of weeks is 40 for Primary and Intermediate schools.

Type of student

Purpose For the purposes of Ministry of Education statistical returns, student types are defined in the following list.

Hierarchy The list is in **hierarchical order from the top down**. More detailed descriptions of all student types follow.

Code	Type of Student
FF	Foreign Fee-paying Student
FE	NZAID-funded Student
EX	Foreign Exchange Student
RE	Regular Student
KT	Kura Teina Student
EM	External Student
SA	Satellite Class Student
NA	Not Attending
SF	Separately Funded

Foreign Fee-paying Student (FF) An International student who meets full tuition costs on their own or from funds provided to them by sponsors other than the New Zealand Ministry of Foreign Affairs and Trade.

NZAID-funded Student (FE) An International student who is a scholarship holder or is the dependant child of a scholarship holder sponsored by the New Zealand Agency for International Development (NZAID) – a branch of the New Zealand Ministry of Foreign Affairs and Trade (MFAT).

Continued on next page

Type of student, continued

Foreign Exchange Student (EX)

An international student who is studying in New Zealand under an exchange programme approved by the New Zealand Government and is exempt from paying tuition fees.

Foreign exchange students are treated as regular students (or adult students, depending on age) for the purposes of Ministry of Education statistical returns.

If, however, a foreign exchange student is paired with a domestic student involved in the same exchange, and the domestic student is counted on the roll, then the foreign exchange student cannot be counted.

Codes for exchange schemes

Foreign exchange students need to be identified in the overseas table in the roll returns. If you use an SMS you can now record the code directly in your SMS system.

Each type of exchange student will be coded as belonging to either:

- A Government-approved Exchange Scheme (e.g. AFS, Rotary – there are 12 types); or
- A Government-approved Exchange Agreement (e.g. a school-on-school agreement. Schools are advised to have documentation to verify this).

Below is a list of the only codes to be used for exchange schemes

Code	Exchange Scheme
01	AFS Intercultural Programmes NZ Inc
02	ARK International Educational Travel & Exchange
03	ASSE NZ
04	EF Foundation
05	IGO International Ltd
06	Kiwiana Exchange (NZ)
07	NZ/German Student Exchange
08	NZ Institute Of International Understanding
09	Rotary International New Zealand
10	STS High School Foundation
11	YFU New Zealand Inc
12	World Youth Service Society (WYSS)
Code	Approved School to School Exchange
99	NZ School has a partner school in another country which is approved by the NZ government.

Continued on next page

Type of student, continued

Regular Student (RE) A New Zealand student or a student treated for funding and staffing purposes as a New Zealand student, who is aged less than 19 years at 1 January of the roll count year.

Includes: Students in general classrooms and those in special needs units.

Excludes: Foreign fee-paying students and NZAID-funded students, alternative education students, and adult students.

Kura Teina Student (KT) A student who attends a Kura Teina.

A Kura Teina is a developing Kura which is attached to a recognised Kura Kaupapa Māori – referred to as the Kura Tuakana.

This code (KT) should only be used by the Kura Tuakana to identify students at their Kura Teina, so that their SMS does **not** include them on the roll of the Kura Tuakana.

Note: If the Kura Teina uses a Student Management System of its own, the students should be entered as **regular** students (RE) and a roll return print-out produced as for a school.

For further information on Kura Teina students, please refer to the section on page [21](#).

External Student (EM) A student who attends your school for some courses but is enrolled at another school where the majority of instruction occurs.

These students are counted on the roll of the school where the majority of instruction occurs, and are therefore excluded from your school's roll returns.

Satellite Class Student (SA) Some schools host a special school satellite class for students with special needs.

Satellite class students count on the roll of the **special school** and are therefore excluded from the roll return of the school where the satellite class is situated.

Not Attending (NA) This student type has been created to cater for those students not attending on the day of the roll count if there is no documentation to support their absence from school. The NA code is for temporary absence only and should not be used for students who have left the school permanently.

Separately Funded (SF) A student in a separately funded unit and therefore excluded from the roll count.

Zoning status

Definition	<p>Zoning status applies to state (non-integrated) schools only.</p> <p>In a state school which has a Ministry of Education approved enrolment scheme, a student's zoning status indicates whether s/he resides inside or outside the school zone.</p> <p>It is based on his/her address on the date of first attendance at the school. A student's zoning status <u>does not change</u> while s/he is enrolled at your school.</p> <hr/>
Why do we collect this?	<p>The information collected from the relevant schools assists the Ministry in making decisions about the provision of accommodation.</p> <hr/>
Does my school have an enrolment scheme?	<p>You will probably be aware if your school has a Ministry-approved enrolment scheme, but if you are in any doubt, please check out www.schoolzones.co.nz to see if you do.</p> <p>Private schools do not have Ministry-approved enrolment schemes.</p> <p>If your school does not have a Ministry-approved enrolment scheme then you do not need to complete the table for question 6 in the March roll return..</p> <hr/>
Enrolment scheme vs Zoning	<p>Kura Kaupapa Māori, designated character schools, special schools, and state integrated schools may have an approved enrolment scheme but they will not have a zoning component and therefore do not need to provide information about their enrolment scheme.</p> <hr/>
Recording students' zoning status	<p>There are three codes to record Zoning Status:</p> <ul style="list-style-type: none">• In zone – student resides inside the school's zone on the date of first attendance• Out of zone – student resides outside of the school's zone on the date of first attendance• NAPP – Not applicable. <hr/>
Who is coded NAPP?	<p>The following students must be coded as NAPP (Not applicable):</p> <ul style="list-style-type: none">• All students whose date of first attendance at your school is prior to the effective date of your school's enrolment scheme• All foreign fee-paying and NZAID (formerly MFAT) students• Students attending your school but enrolled elsewhere. <hr/>
Schools with SMSs	<p>Your SMS should include the facility for you to indicate whether you have an enrolment scheme. If you do not have one, your SMS should automatically default all your students to the 'Not applicable' (NAPP) status.</p> <hr/>

Contact Details and Links

About roll returns For further information about completing your roll returns, or assistance with developing an enrolment form for your school, please contact:

Andrea Jones			
—	Mail	Data Management Unit Ministry of Education P O Box 1666 Wellington	τ Phone 04 463 8070
			☒ Fax: 04 463 8088
			✉ Email school.returns@minedu.govt.nz

About funding or staffing For information about funding or staffing entitlements, please contact the Resourcing Helpline on 04 463 8383.

About SMSs Schools using computerised Student Management Systems should contact their SMS suppliers if they experience any difficulties using their software.

Links to useful website addresses The following Ministry website addresses may be accessed for further information.

Website address	Documents at this website
Roll Return Links	
www.educationcounts.edcentre.govt.nz/goto/guidelines	<ul style="list-style-type: none"> • Roll Return Guidelines 2007
www.educationcounts.edcentre.govt.nz/goto/collection-forms	<ul style="list-style-type: none"> • March roll returns (available mid-February) • July roll returns (available mid-June)
www.minedu.govt.nz/goto/schoolrollreturns	<ul style="list-style-type: none"> • Country of citizenship codes • Ethnic codes • Iwi codes • School numbers and names
Other Links	
www.minedu.govt.nz/goto/circulars	Education circulars
www.minedu.govt.nz/goto/resourcinghandbook	Resourcing handbook
www.minedu.govt.nz/goto/resourcingforms	Resourcing forms
www.minedu.govt.nz/goto/sms	Information on SMS project initiatives
http://www.minedu.govt.nz/goto/smsmanual	SMS Roll Return manual

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