



MINISTRY OF EDUCATION

Te Tāhuhu o te Mātauranga

2012 Roll Return Guidelines

Primary and Intermediate Schools

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Overview

Introduction

The Ministry of Education collects March and July roll returns from all primary and intermediate schools every year. The Ministry uses the roll return data:

- to fund and staff schools
 - to support policy analysis
 - to monitor the results of the New Zealand education system
 - for national and international reporting.
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Purpose of guidelines

These guidelines are to support all primary and intermediate schools with their school roll returns. These guidelines are for:

- principals – responsible for their school's roll returns overall
 - staff that principals may delegate to complete the roll returns.
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Student management systems

These guidelines are for all primary and intermediate schools with or without Student Management Systems (SMS).

For more information about SMS go to:

- www.minedu.govt.nz/goto/sms.
-

Download the guidelines

You can download these guidelines on the Education Counts website:

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

Sending your roll return

Send your completed roll return to:

✉ **Free Post Authority Number 159045**
Data Collection Unit
Ministry of Education
P O Box 1666
Wellington

Further questions

For further information about completing your roll return contact:

☎ **Telephone: 04 463 0915**
📠 **Fax: 04 463 8088**
✉ **Email: school.returns@minedu.govt.nz**

Privacy

Collecting personal information

The Education Act allows the Ministry to collect personal information about New Zealand school students. You enter most of this information in your SMS and send it electronically to the Ministry as part of the roll return. You enter some of this information in ENROL.

Information privacy – staff and students

The Ministry treats student and staff¹ information confidentially. The Ministry restricts access to this information to authorised personnel within the Ministry. The Ministry will not release information that identifies individuals to any person, group, or agency outside the Ministry. The Ministry will only release the information publicly in aggregate form.

Information privacy – boards of trustees

The Ministry makes the names of board of trustees available to the public. The Ministry treats other information collected about individual members confidentially.

Privacy Statement for School Enrolment Forms

Below is a privacy statement your school can use on its enrolment forms.

Privacy Statement	<p>The school collects the information on this form to:</p> <ul style="list-style-type: none">• enrol your child at school• assess the educational needs of your child• ensure the school gets the correct resources from the Ministry of Education for your child. <p>The school collects and uses your child's information in accordance with the Privacy Act. The school sends some of your child's information to education and health agencies. The school will not provide your child's information to any other people or agencies without your authorisation, unless needed by law.</p> <p>You can view your child's records by asking the school.</p>
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Notes for schools

Your privacy statement should explain to parents that your school doesn't need parental consent to send roll return and ENROL information about their child to the Ministry.

You should consider being clear about what you send and don't send to the Ministry. Schools won't send all the data they collect to the Ministry. For example, you don't send information about emergency contacts or custody arrangements as part of the roll return.

¹ Employed by boards of trustees

What's New in 2012

Overview

- The Ministry has made four notable changes to the roll returns this year:
1. Renaming of Ongoing and Reviewable Resourcing Scheme (ORRS).
 2. Added three ethnicities to the July return:
 - a. Middle Eastern
 - b. Latin American
 - c. African.
 3. Added totals to the Māori and Pacific medium tables.
 4. Redesigned the roll return form.
-

1. Ongoing resourcing scheme (ORS) and section 9 students

The Ministry has renamed Ongoing and Reviewable Resourcing Scheme (ORRS) as Ongoing Resourcing Scheme (ORS).

For schools using an SMS, the *ORRS* field is now called *ORS and section 9*. You can still select the values **H** and **V** for ORS students. But now you can select value **S** for students with a *section 9* agreement.

The value **S** has the same effect as the values **H** and **V**. These values relax the age validation rules in the SMS; allowing you to print more accurate roll returns.

Note: Prioritise the ORS values (H or V) over the section 9 value (S) i.e. choose H or V (if applicable) over S.

2. New ethnicities

Added three extra ethnicities to the July return:

- Middle Eastern.
 - Latin American.
 - African.
-

3. Totals in Māori and Pacific medium tables

All SMS's now print totals at the bottom of these tables:

- Highest Level of Māori Language Learning (SMS tables M4 and J7).
- Highest Level of Pacific Medium Education (SMS table J9).

The Ministry has added totals to the bottom of the paper-based forms as well.

4. New form design

The Ministry has redesigned the form to:

- make the form easier to read and use
- save paper.

Send feedback on the form design to:
school.returns@minedu.govt.nz

Update your SMS

Update your SMS to the latest version. The latest version of your SMS will apply all of the above rule changes automatically when you generate your roll returns.

Roll returns 2012

Introduction

In 2012, the Ministry is collecting two roll returns for primary and intermediate schools:

- March 2012.
 - July 2012.
-

Roll return parts

Every roll return has four parts:

Part:	Completed by:	Refer to:
Roll return form and insert	All schools	Pages 9 to 10
Student management system (SMS) table print-outs	Schools with a student management system (SMS)	Page 11
Student data file (.moe file) from SMS	Schools with an SMS	Pages 12 to 13
Updating ENROL	All schools	Page 14

Key dates for Roll Returns and ENROL

Timeline

Term	Date	Event	Steps
Term 1	Early Feb.	Enrol new and transferring students in ENROL and your SMS	All schools should: <ol style="list-style-type: none"> 1. Update ENROL with Year 7 students from contributing schools. Use <i>batch processing</i> in your SMS if possible. 2. Enrol other transferring students. Your SMS can list transferring students and sort by previous school and year level. 3. Create new records in ENROL for new entrants and other students enrolling in a New Zealand school for the first time.
	Mid Feb.	March Roll Return package arrives	All schools should prepare for the March Roll Return. For schools with a student management systems (SMS): <ol style="list-style-type: none"> 1. Install the latest version of your SMS. 2. Ensure data entry is up-to-date. 3. Trial your Roll Return process until you resolve all errors.
	1 Mar.	March Roll Return count date	You have two weeks from the count date to complete the Roll Return form and post it to the Ministry. Send your student data file (.moe file) through eReturns or the portal if you use an SMS.
	13 Mar.	March Roll Return due date	The Ministry should receive your Roll Return form and student data file (.moe file) by 13 March 2012.
	Mid Apr.	NSID files released	For schools with an SMS: <ol style="list-style-type: none"> 1. The Ministry releases NSID files on ENROL. The Ministry creates these from student data file (.moe file). 2. You should upload the file into your SMS to populate the NSN's for your students.
Term 2	Mid Jun.	July Roll Return package arrives	All schools should prepare for the July Roll Return. For schools with a student management system (SMS): <ol style="list-style-type: none"> 1. Install the latest version of your SMS. 2. Ensure data entry is up to date. 3. Trial your Roll Return process until you resolve all errors.
	27 Jun.	July Roll Return count date	You have two weeks from the count date to complete the Roll Return form and post it to the Ministry. Submit your student data file (.moe file) through eReturns or the portal if you use a SMS.
	9 Jul.	July Roll Return due date	The Ministry should receive your Roll Return form and student data file (.moe file) by 9 July 2012.
Term 4	Mid Nov – Dec.	Withdraw leaving students in ENROL and SMS	Use your SMS to sort leavers by the school they intend to transfer to. Sort Year 6 or 8 students by Leaving Reason. Using Batch processing, from within your SMS withdraw Year 6 or 8 students then withdraw other students leaving your school.

Roll Return Form

Introduction The roll return form is the Ministry's main statistics collection form for schools.

All primary and intermediate schools, including schools with SMS's, must complete their roll return form.

Updating your details The Ministry prints some of your school's profile information on the front of the form. Your school profile information includes:

- Postal address
- Location address
- Contact details
- Emergency contact details.

Amend the form if the information is incorrect.

Completing the form with an SMS Attach SMS printouts to the back of your form if your school uses an SMS. However, there are some questions that you can only complete by hand.

Completing the form without an SMS You can complete all the questions by hand if your school doesn't use an SMS.

Inserts for state schools The Ministry includes inserts with the roll return forms for state and state-integrated schools. The table below lists the inserts:

Name	Description	Collection
Insert C	Board of Trustees Membership as at 1 March 2012	March and July
Insert E	Loss of Permanently Appointed Teachers	July
Insert Z	Email release consent	March

Continued on next page

Roll Return Form, Continued

Questions March 2012

The table below lists the questions in the March 2012 roll return form:

Question topic	Primary (RS30)	Intermediate (RS35)
Student management systems	Q1	Q1
Roll by type of student <i>(Attach M3 table from SMS)</i>	Q2	Q2
Māori medium education <i>(Attach M4 table from SMS)</i>	Q3	Q3
Teaching staff in private schools <i>(private schools only)</i>	Q4	Q4
Peak rolls <i>(state and state integrated schools only)</i>	Q5	Q5
Off-site class, unit or activity centre <i>(state and state integrated schools only)</i>	N/A	Q6
Vacancies for full-time permanent teachers <i>(state and state integrated schools only)</i>	Q6	Q7
Limited term appointments and day-to-day relieving <i>(state and state integrated schools only)</i>	Q7	Q8

Questions July 2012

The table below lists the questions in the July 2012 roll return form:

Question topic	Primary (RS31)	Intermediate (RS33)
Student management systems	Q1	Q1
Roll by type of student <i>(Attach J3 table from SMS)</i>	Q2	Q2
Roll by funding year level and age <i>(Attach J4 table from SMS)</i>	Q3	Q3
Roll by ethnic group and age <i>(Attach J5 table from SMS)</i>	Q4	Q4
Roll by ethnic group and funding year level <i>(Attach J6 table from SMS)</i>	Q5	Q5
Highest level of Māori language learning <i>(Attach J7 table from SMS)</i>	Q6	Q6
Pacific medium education <i>(Attach J9 table from SMS)</i>	Q7	Q7
Language learning	Q8	Q8
Predicted rolls	Q9	Q9
Off-site class, unit or activity centre <i>(state and state integrated schools only)</i>	Q10	N/A

Student management system (SMS) table printouts

Introduction Your student management system (SMS) prints roll return tables when you run your SMS's roll return process. You can attach some of these tables to your roll return form for some of the questions.

Purpose of the printouts Attaching the print-outs to your form saves you from completing all the tables by hand. Using the tables also reduces the chance of human error.

Important The SMS printouts supplement the form. The printouts don't replace the form.

Which tables should you send? You don't need to send all the SMS tables to the Ministry. The table below lists the tables your SMS can create and which tables you should attach to your form.

Table name	March		July	
	SMS table	Attach?	SMS table	Attach?
International students	N/A	N/A	N/A	N/A
Roll count student tables	M3	Yes	J3 – J6	Yes
Māori language learning	M4	Yes	J7	Yes
Previous school	M5	No	N/A	N/A
Zoning status	M6	No	N/A	N/A
ECE	N/A	N/A	J8	No
Pacific medium	N/A	N/A	J9	Yes

Note: In your SMS, you should be able to choose the tables you want to print.

SMS problems You should contact your school's SMS supplier if you have difficulties using your SMS.

Student data file (.moe file)

Introduction Your SMS creates the student data file (.moe file) when you run your SMS's roll return process. You should submit your school's student data file after completing your roll return process.

Purpose of the student data file Sending the student data file to the Ministry:

- speeds up the Ministry's data entry
- allows the Ministry to provide you with an NSID file
- provides address data for the Ministry's school network planning and transport planning.

Important The student data file supplements the paper roll return. The file doesn't replace the paper return.

Submit your file directly from your SMS You can use the eReturns function in your SMS to send your file directly to the Ministry. eReturns becomes available after you complete the Roll Return process in your SMS.

Contact your SMS vendor if you think eReturns isn't working properly.

Submit your file through the Ministry's portal You can use the Ministry's secure online portal to upload your file if you can't use the eReturns function in your SMS.

You can access the portal through the e-Admin section of the Educational Leaders website:

- **www.educationalleaders.govt.nz.**

Contact the eAdmin Contact Centre for help accessing the portal:

- **04 463 8383**
 - **Email: e.admin@minedu.govt.nz.**
-

Continued on next page

Student data file (.moe file), Continued

Residential address data

The Ministry uses the student addresses in the student data file:

- to identify school catchments to assist schools with short, medium and long term planning and transport issues
- for the legislative requirements of enrolment schemes.

It is important that you record accurate residential address data (not PO Box) in the residential address fields in your SMS.

NSN – name data

The Ministry uses the student names in the student data file:

- to create an NSID file that you can load into your SMS; this helps populate the NSN fields in your SMS
- in data quality work with ENROL.

Ensure that you enter **full legal names** in the legal name fields in your SMS. You can enter **preferred names**, for administrative purposes, into the preferred name fields.

Schools with no SMS

You don't need to send a student data file if your school doesn't use an SMS. The Ministry will ask some schools to complete a spreadsheet of student information.

SMS problems

You should contact your school's SMS supplier if you have difficulties using your SMS.

Data collected from ENROL

Introduction The Ministry collects some roll return information directly from the ENROL database. Please ensure that you maintain ENROL in accordance with the ENROL rules

Why collect from ENROL Collecting data from ENROL saves time by reducing the number of tables you need to send to the Ministry. Using ENROL also reduces the chance of errors.

What do we collect from ENROL? The Ministry uses ENROL to:

- calculate the international student levy (ISL) each trimester
- get the country of citizenship and the exchange scheme for exchange students
- get ECE participation statistics
- collect previous school information for each student
- determine when your roll peaked last year.

Please ensure your student details are up-to-date in ENROL.

Further questions about ENROL For further information about ENROL or e-admin access contact:

 **Telephone: 04 463 8383**

 **Email: e.admin@minedu.govt.nz**

Preparing for your roll return

Get your enrolments up-to-date

To count a student on your school's roll return you first need to enrol him or her at your school.

To enrol a student who's new to the New Zealand Education system you first need to get documentation that proves his or her:

- eligibility status
- name and date of birth.

Get this documentation when you first enrol the student if possible.

Keep data stored in your SMS and ENROL up-to-date

You need to update your SMS and ENROL with new enrolments and leavers before you run your school's roll return.

You will need to:

- collect the student enrolment data as detailed in the **Student and School Records** chapter in these guidelines
- enter and store this information on your school's SMS (if you use one) and ENROL
- determine which students should be counted in your roll return – refer to **counting students** on page 21.

Also check Māori language levels and zoning statuses for existing students.

Checking your SMS data

You can run validation checks in your SMS before roll count date. Do this to resolve any errors before the roll count day.

When can you run the roll return in your SMS?

You do not have to run the roll return process in your SMS on the roll count day. Your SMS has been designed so it can be run any day for up to 2 months after the count date. It will still only include students that were enrolled on the count date.

Completing your March 2012 roll return

Introduction This section provides information on completing your March 2012 roll return.

Check ENROL and SMS Before you begin, ensure ENROL and your school's SMS are up-to-date – including enrolments, leavers, international student weekly fees and off site students.

Process for completing your March return Use the following steps to complete your roll return.

Stage	Description
1	Run March Roll Return validation in your school's SMS – fix any Errors.
2	Print March Roll Return tables: <ul style="list-style-type: none">• Roll by type of student (M3).• Māori language learning (M4). Check the tables for accuracy.
3	Complete all questions in the roll return form. For some of the questions you should attach SMS tables if your school uses an SMS. Attach SMS tables to the back of the form.
4	Complete your insert C and attach to the back of the form.
5	Principal must check and sign off the entire form.
6	Photocopy form and tables.
7	Post <u>original</u> signed form – allow time so that the Ministry receives the return by 11 March 2012.
8	Submit student data file (.moe file) to the Ministry using eReturns or the Ministry's online portal.
9	Table the roll count total at the next Board of Trustees meeting.

Completing your July 2012 roll return

Introduction This section provides information on completing your July 2012 roll return.

Check ENROL and SMS Before you begin, ensure ENROL and your school's SMS are up-to-date – enrolments, leavers, international students weekly fees and off site students.

Process for completing your July return Use the following steps to complete your roll return.

Stage	Description
1	Run July Roll Return validation in your school's SMS – fix any Errors.
2	Print July Roll Return tables: <ul style="list-style-type: none">• Roll by type of student (J3).• Roll by funding year level and age (J4).• Roll by ethnic group and age (J5).• Roll by ethnic group and funding year (J6).• Highest level of Māori language learning (J7).• Pacific medium education (J9). Check the tables for accuracy.
3	Complete all questions in the roll return form. For some of the questions you should attach SMS tables if your school uses an SMS. Attach SMS tables to the back of the form.
4	Complete insert E and attach to the back of the form.
5	Principal must check and sign off the entire form.
6	Photocopy form and tables.
7	Post <u>original</u> signed form – allow time so that the Ministry receives the return by 9 July 2012.
8	Submit student data file (.moe file) to the Ministry using eReturns or the Ministry's online portal.
9	Table the roll count total at the next Board of Trustees meeting.

Domestic and international student enrolments

Domestic and international student definitions

The Ministry defines domestic and international students in Circular 2012/01, which is available at:

- www.minedu.govt.nz/circulars.

The Ministry of Education funds domestic students but does not fund international students and visitors.

Domestic students

Domestic students can access free state funded education. Domestic students fit into two categories:

- Domestic students (Permanent).
 - Domestic students (Time-bound).
-

Domestic students (permanent)

Domestic students (permanent) can access free state funded education permanently.

Domestic students (permanent) can be:

1. New Zealand citizens (including Cook Island, Tokelau or Niue)
2. New Zealand or Australian residents
3. Australian Citizens.

You only need to sight and copy evidence of citizenship or residence when domestic students (permanent) first enrol in a New Zealand school.

Go to Appendix B in Circular 2012/01 for more information.

Continued on next page

Domestic and international student enrolments, Continued

Domestic student (time-bound)

Domestic Students (time-bound) are generally foreign students who hold a current student visa with conditions containing the words “domestic student”.

Domestic students (time-bound) can meet these criteria:

4. Parent has a current work visa and student has a valid student visa.
5. Parent is a New Zealand citizen or resident and student has applied for a residence visa.
6. Parent or student is a refugee or protected person.
7. Parent has a scholarship offered by the New Zealand Aid Programme administered by the Ministry of Foreign Affairs and Trade.
8. Parent has a military visa.
9. Parent is doing a PhD at a New Zealand University.
10. Parent is a diplomat.
11. International adoption.
12. Parent is on an exchange programme.
13. International student who has come into CYF care.
14. Ministry Approved - a student who is in New Zealand unlawfully, has been in NZ for at least six months and normally lives in NZ.

Domestic students (time-bound) are entitled to education in New Zealand as domestic students until their Visas expire.

You should sight and copy the student visa and other supporting documents when a domestic student (time-bound):

- first enrolls in a New Zealand school.
- moves to your school from another New Zealand school.
- provides updated documents to continue their enrolment at your school.

Go to Appendix C in circular 2012/01 for more information.

International student definition

International students are international fee-paying students or international visitors. The Ministry does not fund International students.

International students can meet these criteria:

15. International fee paying with valid student visa with conditions of study that include the name of the school or a valid visitor visa².
16. Exchange student with valid student visa with conditions of study that include the name of the school.

You should sight and copy the student visa and other supporting documents.

Go to Appendix D in circular 2012/01 for more information.

Continued on next page

² A student can enrol using a visitor visa for only up to three months in any calendar year.

Domestic and international student enrolments, Continued

Citizenship, residency and student visa documentation

You should check the citizenship, residency, diplomatic or student visa status of all students when they enrol. This will ensure that you identify domestic and international students correctly.

Permanent domestic students that have a verification documentation number in ENROL **do not need to supply documentation again when they move schools.**

Schools should attach documentation confirming students' citizenship, residency or student visa status to their enrolment forms.

You can confirm a student's status with these documents:

- Birth certificate (NZ, Cook Is., Tokelau, Niue or Aust.).
 - Passport with details of the student's residency status or a valid student or visitor visa/permit.
 - Immigration service documentation of refugee status.
 - Certificate of naturalisation.
-

Counting students

Summary To count a student as a regular student on your roll return the student must:

- be enrolled for tuition
- be a domestic student (refer to domestic student definition on page 17)
- attend the school for tuition on the roll count date.

Other situations where you can count a student? You can count a student when he or she is:

- absent for medical or domestic reasons
- suspended
- attending a activity centre, health camp, hospital school or CYFS
- overseas for no more than 15 weeks
- enrolled at more than one school so long as he or she attends your school most of the time.

Absent for a reason You can count a student when he or she is absent for medical or domestic reasons if he or she:

- returns to school before you return the form to the Ministry
- has a medical certificate from a registered medical practitioner
- has statement from a social worker or counsellor
- has a letter from a parent/guardian justifying the student's absence.

Suspension You can count a student who has been suspended and is not at school on count day.

Activity centre, Health camp, Hospital school or CYFS You can count a student when he or she attends an activity centre, health camp, hospital school, or CYFS residential home on the roll count date.

Students overseas You can count a student when he or she is temporarily overseas, provided that

- you have documented evidence that the student intends to return to your school
- the student is not absent for more than 15 consecutive weeks in the current school year.

Students enrolled in more than one school You can count a student when he or she attends more than one school, provided that he or she attends your school for most of the time. Your school should also hold the students record in ENROL. Boards of Trustees may exchange funds to compensate for the time a student spends at another school.

For further information The Circular 'Auditing of Roll Returns' has full details on counting students. You can access the circular on the Ministry of Education website:

- www.minedu.govt.nz/circulars.

When to NOT count a student

When to not count a student as a regular student

Do not count a student as a regular student if he or she:

- hasn't started yet
- has left your school
- is an international student
- an external student that attends your school but attends another school most of the time.

See below for more information about these categories.

Students that haven't started

Do not count students who have enrolled but have not started at your school. Your SMS will not count these students if you enter the correct attendance start date.

Students that have left your school

Do not count students who have attended their last day but are still going through the school's leaving process. Your SMS will not count these students if you enter the correct leaving date.

International students

Do not count international fee paying students as regular students. You should count them as international students in your roll return. Ensure you code them correctly in your SMS.

External students

Do not count an external student on your roll return.

The student's other school should enrol and count the student.

Not counting a student in your SMS

You can change a student's type to *not attending* (NA) if you don't want to count a student in your roll return for any other reason. This is generally for students who are not attending your school but you are unsure if they are leaving or not.

Student and School Records

Introduction The following sections specify the student information that the Ministry requires for roll returns. This includes current students and leavers.

The following sections also specify the school records that the Ministry requires about Board of Trustees, Teachers, school rolls and off-site units.

SMS You can enter most of the information the Ministry needs in your SMS.

You will still need to collect, store and report on the data if your school does not use an SMS. It's up to you how you do this but your process needs to be reliable and auditable.

Enrolment forms Use your enrolment forms to collect most of the individual student data the Ministry requires for roll returns. Design your enrolment form so you can collect this data along with other data your school might need.

What data is required? The student data the Ministry requires for Roll Returns are set out in the following pages.

Student data required for Roll Return purposes

Data required for Roll Returns In order to complete your roll return you need to collect enrolment data for each student. The table below lists all the data you need to collect for each student. Schools with SMS's send this information to the Ministry in the student data file (.moe file). The Ministry can also collect the data through ENROL where indicated.

Field name	Field Description	Student data file	ENROL
ADDRESS	Student's home address.	✓	✓
COUNTRY OF CITIZENSHIP	Country of citizenship.	✓	✓
CURRENT YEAR LEVEL	The student's class year level.	✓	✓
DOB	Student's date of birth.	✓	✓
ECE	Indicates whether or not a student participated in Early Childhood Education.	✓	✓
ELIGIBILITY CRITERIA	Indicates that a student is Domestic, international fee-paying or international fee-exempt.	✓	✓
ETHNICITY	Student's ethnic groups.	✓	✓
EXCHANGE SCHEME	Indicates an exchange student's scheme or agreement.	✓	✓
EXPIRY DATE	Date the verification document expires.	✓	✓
FIRST ATTENDANCE DATE	Date the student first attended your school.	✓	✓
FIRST SCHOOLING DATE	Date the student first started schooling.	✓	✓
FIRST NAME	Student's legal first name.	✓	✓
FTE	Full-Time equivalent.	✓	✓
FUNDING YEAR LEVEL	The actual number of years the student has attended school.	✓	x
GENDER	Student's gender.	✓	✓
IWI	Student's Iwi affiliation.	✓	✓
LAST ATTENANCE DATE	Date the student last attended your school for tuition.	✓	✓
MAORI MEDIUM	Highest level of Māori Language Learning the student is involved in.	✓	x
MIDDLE NAME	Student's middle name(s).	✓	✓

Continued on next page

Student data required for Roll Return purposes, Continued

Field name	Field description	Student data file	ENROL
NSN	Student's national student number.	✓	✓
ORS AND SECTION 9	Indicates level of resources required for ORS or if the student has a section nine agreement.	✓	✓
PACIFIC MEDIUM – LANGUAGE	Particular Pacific island language of immersion or bilingual education.	✓	✗
PACIFIC MEDIUM – LEVEL	The highest level of Pacific medium learning the student is taught in.	✓	✗
PREFERRED FIRST NAME	Student's preferred first name.	✓	✓
PREFERRED SURNAME	Student's preferred surname.	✓	✓
PREVIOUS SCHOOL	Previous School of Year 7 and Year 9 students.	✓	✓
PRIVACY INDICATOR	Indicates that the student address is suppressed for privacy reasons.	✓	✓
REASON	Student's reason for leaving their present school.	✓	✓
SCHOOL ID	School Profile Number.	✓	✓
SERIAL NUMBER	Verification document serial number.	✓	✓
STUDENT ID	Student's ID Number.	✓	✗
STUDENT TYPE	Student Type for funding purposes.	✓	✗
SURNAME	Student's legal surname.	✓	✓
TUITION FEE	Tuition Fee paid by international students specifically International Fee payers (FF). NOTE: The Ministry now collects tuition fee through ENROL only.	✓	✓
TUITION WEEKS	Number of weeks an international student is enrolled. NOTE: The Ministry now collects tuition weeks through ENROL only.	✓	Derived
VERIFICATION DOCUMENT	Document used to verify the student's name, DoB and eligibility status.	✓	✓
ZONING STATUS	Indication of whether the student resided in or out of the School Zone at date of first attendance at your school.	✓	✗

Address

Introduction

The Ministry gets student address data from the student data file (moe file) you send to the Ministry. These addresses come from your SMS so you need to make sure that student addresses in your SMS are correct and up-to-date.

Residential address and postal address

Collect a student's residential address when he or she first enrolls at your school and try to keep the address up-to-date. Your SMS has a field for residential address and for postal address. **Never enter a PO Box or Private Bag address in the residential address field.**

Why collect address data?

The Ministry uses student residential addresses to identify school catchment areas. This helps schools and the Ministry:

- with short-term planning
 - roll growth classrooms
 - enrolment schemes
 - with medium and long-term planning
 - roll projection guides
 - proportions of school type and market share
 - network capacity
 - future property needs
 - with transport planning and issues.
-

Board of trustees – Insert C

Introduction The Ministry sends an Insert C with the March and July roll returns. The Ministry prints the Insert-C with the latest board of trustees details held by the Ministry. The Ministry needs you to check these details because they can become outdated.

Note: The Ministry only collects board information from state and state-integrated schools.

Board details The Ministry prints the Insert C with the name, title, gender, board position, member type and ethnicity for each board member. The Insert C also includes contact details for the chair.

Checking your board details

When you check your board details please:

- ensure all details for board members are correct
- cross out individuals who are no longer board members
- add new board members below the current board members
- ensure your board contains:
 - one principal (or Acting Principal)
 - one staff representative
 - one student representative
 - one chair (or Acting Chair)
 - five elected parent representatives*
- update the chairperson's address, phone and email address if necessary.

*A standard board has five elected parent representatives. But boards may have three to seven elected parent representatives. For more information about board constitutions go to:

- www.minedu.govt.nz/Boards/EffectiveGovernance.
-

Why collect board information?

The Ministry needs to know who is on each school board and must be able to contact the chair of each board.

The Ministry also uses the board information to get statistics about the make-up of boards in general, for example, the proportions of men and women, or ethnic representation.

Country of citizenship

Introduction You must record this information in ENROL and your SMS. Collecting country of citizenship is the first step in finding out if a student is a domestic or international student.

Country of citizenship Country of citizenship is a student's nationality and the country for which he or she holds a passport. It makes no difference whether the student was born into that nationality or whether he or she later adopted that nationality. Country of citizenship may be country of origin or birth, but not necessarily.

Note: do not confuse country of citizenship with ethnicity.

Codes You can find a list of country of citizenship codes on the Education Counts website:

- www.educationcounts.govt.nz/goto/codesets.

Dates (date of birth, first schooling date, first date of attendance, and last date of attendance)

Introduction

The Ministry collects four dates for each student:

- Date of birth.
 - Date of first schooling.
 - Date of first attendance at your school.
 - Date of last attendance at your school.
-

Date of birth

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

First schooling date

A student's first schooling date is the date he or she first attended **any** school. This date is usually between his or her fifth and sixth birthdays. For a primary student, the date sets his or her Funding Year Level. You must record the first schooling date for every student, even if he or she first started schooling at a different school.

The first schooling date sets a student's Current Year Level in ENROL. Although you can manually change the Current Year Level in ENROL if necessary.

Choose the **student's sixth birthday** if his or her first schooling date is unknown e.g. for refugee children or previously home-schooled students.

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

First attendance date

A student's first attendance date is the date he or she first attended **your** school. Use the first attendance date to decide whether to count a student on your roll return.

A student can fit into two circumstances:

- A student may transfer to your school from another school.
- A student starts their schooling at your school so his or her first attendance date is the same as his or her first schooling date.

You may enrol a student some time before he or she starts attending your school, but note that this enrolment date is not the first attendance date.

Last attendance date

A student's last attendance date is the date he or she leaves your school for tuition. Use the last attendance date to decide whether to count a student on your roll return.

Early childhood education (ECE) participation (for year 1 students)

Introduction The Ministry gets early childhood education (ECE) participation data from ENROL. The ECE data you enter in ENROL is critical to the Ministry's early childhood education team. The Ministry has no other source that can provide accurate ECE participation data within ethnic groups.

ECE participation The Ministry needs data for new entrants and year 1 students transferring from other schools.

School administrators should identify:

- whether year 1 students attended any form of Early Childhood Education (ECE) regularly in the six months before starting school
- the number of hours per week they attended each ECE service (up to three services)
- the total number of years the student regularly attended ECE services.

The Ministry recommends you collect this information on your enrolment form. You can find information and examples of enrolment form questions at:

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

Reporting the data in ENROL and your SMS You must enter this information in ENROL for new entrants. You don't need to enter this information into your SMS for new entrants; although you might find this useful.

Eligibility criteria

Introduction

Collecting eligibility criteria information:

- establishes a student's entitlement to education in New Zealand
 - ensures the Ministry correctly funds your school to provide that education.
-

When to collect eligibility information

You need to collect the eligibility information:

- when you enrol domestic students (permanent) new to the New Zealand schooling system
 - when you enrol domestic students (time-bound) at your school
 - when a domestic student (time-bound) provides updated documents to continue their enrolment
 - when you enrol international students at your school.
-

Collecting eligibility information

Follow the steps below when you collect a student's eligibility information:

Stage	Description
1	The parent or caregiver must provide supporting documentation with the students enrolment form.
2	Use the documentation to verify the student's name, date of birth and eligibility status. Record the: <ul style="list-style-type: none">• eligibility document type (e.g. passport, birth certificate or visa)• serial number• expiry date if applicable.
3	Copy the document and attach to the student's enrolment form.
4	Enter details in: <ul style="list-style-type: none">• ENROL (Compulsory)• SMS (Recommended).

Accepted documents

You can find a full list of accepted documents in Circular 2012/01 on the Ministry's website:

- www.minedu.govt.nz/circulars.
-

Continued on next page

Eligibility criteria, Continued

Expiry date

For documents that expire, you should:

- note the expiry date
- send student visa or permit renewals to Immigration New Zealand at least four weeks before the current visa or permit expires
- hold a copy of updated documentation.

Documents for New Zealand citizens or residents, or Australian citizens do not expire.

Verification document serial number

Recording the verification document’s serial number provides proof the school administrator has witnessed the documentation.

Ethnicity

Introduction	<p>The Ministry uses ethnicity data to monitor the participation, retention and achievement of different ethnic groups in New Zealand. The Ministry and other agencies use ethnicity with other data to describe the New Zealand population.</p>
Definition	<p>The Ministry uses Statistics New Zealand’s definition of ethnicity: ethnicity is 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. Ethnicity is self-perceived and people can affiliate with more than one ethnic group.</p> <p>School enrolment forms should allow students to identify with up to three ethnicities.</p>
Recording ethnicity	<p>You can record multiple ethnicities for one student. Your SMS and ENROL allows you to enter three ethnicities for each student.</p>
Reporting ethnicity	<p>You need ethnicity data to answer question four and five of the July roll return. Question four is roll by ethnic group and age. Question five is roll by ethnic group and funding year level.</p> <p>You can only report a student as being in one ethnic group in your Roll Return tables. The Ministry uses Statistics New Zealand rankings to decide which ethnic group to use when a student identifies with more than one ethnicity – refer to appendix A for the ranking order.</p>
Roll return – using an SMS	<p>When you create your roll return tables your SMS automatically ranks the ethnicities using Statistics New Zealand rankings – refer to appendix A for the ranking order.</p>
Completing tables by hand	<p>Use the table in Appendix A to help you rank and group ethnicities if you complete the form by hand.</p> <p>Example 1: A student identifies as New Zealand Māori (211) and New Zealand European or Pākehā (111).</p> <ul style="list-style-type: none">• Record both ethnicities in his or her individual student record.• Report as New Zealand Māori in ethnicity by funding year level and ethnicity by age tables in your roll return. <p>Example 2: A student identifies as Vietnamese (413) and New Zealand European or Pākehā.</p> <ul style="list-style-type: none">• Record both ethnicities in his or her individual student record.• Report as South-east Asian in ethnicity by funding year level and ethnicity by age tables in your roll return.

Full-time equivalent (FTE)

What is FTE? The Ministry funds schools based on FTE. Calculate FTE by adding together class contact hours, dividing by 20 and rounding to one decimal point. FTE can be between 0.1 and 1.0. Note that:

- a full-time student has FTE = 1.0
- a part-time student has FTE < 1.0.

FTE for years 1 – 8 All students in Years 1–8 must counted as full-time students (i.e. have a FTE = 1.0). Your SMS will default Year 1 – 8 students to full-time.

Gender

Gender The Ministry uses gender data to monitor the participation, retention and achievement of each gender in New Zealand. The Ministry and other agencies use gender with other data to describe the New Zealand population.

Recording gender Record the gender (male or female) of each child in your SMS and ENROL.

Iwi affiliation

Introduction The Ministry collects Iwi affiliation data from the student data file sent by Schools using SMS's. This Iwi data comes from your SMS so you need to make sure that student Iwi affiliation is entered in your SMS.

Iwi affiliation Iwi affiliation is about ancestry. Some people will affiliate with an Iwi but won't identify as Māori. Therefore **all students** can affiliate with an Iwi.

The Ministry uses the data to report to Iwi authorities and rūnanga on the educational participation and achievement of their children. The Ministry and schools also use this data for statistical purposes.

Collecting Iwi affiliation Your school's enrolment form should ask student's for Iwi affiliations. You should record Iwi affiliation in your SMS.

You should also record Iwi affiliation data in ENROL.

The Ministry doesn't ask Iwi affiliation questions in the roll return forms.

Iwi affiliation code list The Ministry uses Statistics New Zealand standard classification to code Iwi. Use these codes when you enter the Iwi affiliations into your SMS.

You can information about Iwi classification on the Education Counts website:

- www.educationcounts.govt.nz/goto/codesets.

You can send other queries about collecting and coding Iwi to:

- iwi.data@minedu.govt.nz.
-

Language learning below Year nine

Introduction

Language learning below year nine is question eight in the July 2012 roll return. This question collects data on the numbers of students at primary Year Levels who received language tuition (other than English or Te Reo Māori) any time during the year.

Note: the Ministry can only collect language learning data from the roll return form i.e. the Ministry can't get the data from the student data file or ENROL.

Why collect language data?

The Ministry collects language learning data to measure participation in language education.

Language learning

The Ministry collects data on these languages:

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

Reporting language learning data

Count Year 1–6 students together and Year 7–8 together. Within these two groups classify the students as learning:

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

Learning over the year

You should estimate the number of students receiving language instruction over the entire year if your school teaches a language rotationally e.g. term by term.

Pacific Languages

Note: Do not include students learning Pacific languages if you've already counted them in the Pacific-medium question.

Māori language learning

Introduction *Māori language learning* is question three in the March roll return, and Question six in the July return.

The Ministry uses the Māori language learning data to:

- fund schools for Māori language and immersion programmes
 - measure participation in these programmes.
-

Collecting Māori language learning data You must record the highest level of Māori language learning for each student. You can record the highest level of Māori language learning in your SMS.

The levels are split into three groups:

- Māori-medium.
 - Māori language.
 - Taha Māori.
-

Māori-medium Your school delivers the whole curriculum in Māori only (immersion) or in both Māori and English (bilingual). This covers four levels.

Level	School teaches curriculum in Māori:
1	100% of the time, i.e. complete immersion (25 hours per week) 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, i.e. for more than 3 and up to 7.5 hours per week

Te Reo Māori Your school teaches Māori language as a subject. This covers two levels.

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

Some schools offer Te Reo Māori as a separate subject but rotate students through the Te Reo Māori programme – perhaps for a term at a time. Count only the number of students involved in the programme on roll count date if this applies to your school.

Taha Māori Your school teaches Māori songs, greetings and simple words. This covers just one level.

Level	Description
6	Māori songs, greetings and simple words

Māori language learning, Continued

Reporting Māori language learning data

The Māori language learning table has two rows for each level:

- Enter the total number of students (Māori and non-Māori) at that level of Māori language learning in the first row.
- Enter the number of Māori students in the second row second row.

Complete both rows, even if all your students are Māori.

Your SMS will complete the Māori language tables when you run your roll return process. But check the tables.

Exclude international students

Exclude international students from Māori language learning. International students are not eligible for Māori language funding.

Your SMS will automatically exclude international-fee-paying students.

National Student Number (NSN)

Introduction The National Student Number (NSN) is a unique identification number for every student in a New Zealand school. The Ministry allocates NSN's to when you record a student in ENROL.

Why have an NSN? Having the NSN allows:

- students to better monitor their own education history
- the education providers to manage and share information about students easily and in a way that protects student privacy
- the Ministry of Education to uniquely identify students and undertake longitudinal studies.

What is collected? The NSNs are stored in the National Student Index database. The National Student Index includes only basic student information:

- name
- date of birth
- residential status
- gender.

The National Student Index **does not** include academic results or information about where students live.

Using NSNs in the school's SMS You can import NSNs from ENROL into your SMS using the Get/Check function in your SMS, saving the NSN against each student record.

Note: The NSN doesn't replace your school student identification number.

Off-site classes and units

Introduction

For Primary schools *off-site classes and units* is question 10 of the July 2012 roll return.

For intermediate schools *off-site classes and units* is question six of the March 2012 roll return.

You should list any Activity Centres, Off-site Learning Centres, Off-Site Classes or Special Purpose Units that your Board of Trustees are responsible for.

Note: Only state and state-integrated schools need to report on off-site classes and units.

Off-site learning centres

Off-site classes or units are programmes your school runs separately from mainstream classes. The Ministry funds these programmes separately.

Students at off-site learning centres remain on the roll of a main school and should return to the main school.

What is collected?

Keep records of your off-site classes and units, and the count of students attending them by gender.

Do not include students from your school who go to another school or unit run by an organisation for a special class e.g. technology classes at the local college.

ORS and Section nine

Introduction The Ministry doesn't ask specific questions about ORS or section nine students in the roll returns. You can count ORS and section nine students on your roll return as regular students. However, you can create problems if you don't enter the ORS or section nine values in your SMS correctly.

ORS and section 9 covers two loosely related programmes:

- Ongoing Resourcing Scheme (ORS).
 - Section nine agreements.
-

Ongoing Resourcing Scheme (ORS) The Ongoing Resourcing Scheme (ORS) provides resources for students with the highest special education needs. Most often these students have these special education needs permanently. ORS can be *high needs* or *very high needs*.

Note that the Ministry has renamed Ongoing Resourcing Scheme (ORS) from what was Ongoing Reviewable Resourcing Scheme (ORRS).

Section nine agreement A section nine agreement is a formal agreement between the Ministry of Education and the parents or guardians of a child or young person. A section nine agreement allows the child or young person to receive special education services or to enrol at a special school.

Note:

- ORS students usually have a section nine agreement.
 - Not all section nine students are ORS students.
 - The Ministry sends a confirmation letter to the educator and parents when the Ministry approves an ORS application. The Ministry considers the confirmation letter to be the section nine agreement.
-

Age restrictions ORS and section nine agreements relax the age restrictions for year 1 – 8 students and allow special education needs students to stay at primary school after they turn 14.

Continued on next page

ORS and Section nine, Continued

Setting up ORS and section nine students in your SMS

In your SMS you can record students as:

Description	Value
High ORS,	H
Very High ORS	V
Section nine without ORS	S
No ORS or Section nine	N

Properly setting up a special education needs student using the ORS and section nine field will relax validation rules in your SMS that check:

- Funding Year Level against age
- Age against student type

This allows your SMS to count the students as regular students in the table printouts.

Further information

For further information about ORS and section nine agreements go to:

- www.minedu.govt.nz/NZEducation/EducationPolicies/SpecialEducation/FormsAndGuidelines
-

Pacific-medium – language and level

Introduction *Pacific Medium Education* is question six in the July 2012 roll return. You must report students only once at their highest level of learning.

The Ministry uses Pacific-medium data to:

- measure how much Pacific-medium education schools provide
 - aid policy development.
-

Definition Schools deliver Pacific-medium education curriculum:

- in a Pacific language only (immersion)
 - in a Pacific language and English (bilingual).
-

Pacific languages

The Ministry collects Pacific-medium data for:

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

Pacific-medium education

Schools can report Pacific medium education at four levels.

Level	School teaches curriculum in a 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

The Pacific language learning table has one row for each Pacific-medium level. Enter the total number of students at that level of Pacific language learning by funding year level.

SMS tables

Record the highest level of learning for each student in your SMS. Your SMS will create one J9 table for each Pacific language your school teaches.

Peak rolls

Introduction

The Ministry collects some peak roll data from ENROL. The Ministry collects the remaining peak roll data in question five of the March 2012 roll return.

Note: Peak rolls apply to state and state integrated schools only.

What is collected?

The Ministry collects the following peak rolls:

Peak roll for:	Is collected from:
2011 and month it occurred	ENROL
2012, 2013 and 2014	Question five of the roll return form

The Ministry can only get peak roll data for 2012, 2013 and 2014 from the roll return form. Please complete question five as best you can.

Why collect peak rolls

The Ministry uses peak roll data for property planning and resourcing for schools.

Predicted rolls

Introduction

Predicted rolls is question nine in the July roll return. The question asks for three prediction types:

- Roll predictions.
- Estimated new entrants (for primary only).
- Māori medium predictions.

You can only provide this data on the roll return form. Please enter the data in the form when you complete your roll return.

Why collect predicted rolls?

The Ministry uses the predicted rolls in three ways:

- To help calculate the first funding instalment of 2013.
 - To help calculate the provisional staffing roll for 2013. The Ministry uses the 2013 provisional staffing roll to calculate the Guaranteed Minimum Formula Staffing (GMFS) for 2013.
 - For planning and forecasting.
-

Roll predictions

In July 2012, schools should:

- predict their student rolls for March 2013
 - estimate their student rolls for March 2014 and March 2015.
-

Estimated New Entrants

In 2012, primary schools should estimate New Entrant enrolments from 1 March 2013 – 1 October 2013. The Ministry uses these estimates to improve the accuracy of the Ministry's estimate for roll growth (new entrants) for the school year and resource appropriately.

Māori-medium predictions

In July 2012, schools should predict the total students in Māori language learning levels 1 to 4b for March 2013.

Previous school (Intermediates only)

Introduction The Ministry collects previous school data from ENROL.

Why collect previous school data? The Ministry uses previous school data to help with projecting rolls and property planning.

Recording previous school data in your SMS You should enter a student's previous school in your SMS as part of your enrolment procedure.

Privacy Indicator

What is the privacy indicator Schools should use the privacy indicator in their SMS when a student address details should be suppressed in the student data file for privacy reasons.

Contact the Data Collection Unit if a student's surname needs to be withheld.

Reason for leaving

Introduction The Ministry collects reason for leaving data from ENROL and your school's student data file.

Why collect reason for leaving data? The Ministry uses the reason for leaving data to work out which students to count on the school leaver tables. In March 2012, the school leaver tables will report on students who have left the schooling system permanently in the year to 1 March 2012.

What to record You must enter the leaving reason on a student's record when a student leaves your school. You will need to record this information in your SMS and ENROL.

Select one reason from the following list:

Code	Description
S	Transferred to another school in New Zealand
H	Transferred to home-schooling
O	Gone overseas
D	Deceased
X	Expulsion (applies to those 16 years or older)
L	End of Schooling (applies to those 16 years or older)
E	Granted Early Exemption (applies to those under 16 years old)
K	Exclusion (applies to those under 16 years old)
C	Continuous Absence

School ID

What is School ID? School ID is the unique identifier number the Ministry of Education assigns to schools.

Student ID

What is student ID? Student ID is the unique identification number your SMS assigns to your students.

Student name

Introduction The Ministry collects the names in the student data file (.moe file) that you send to the Ministry.

Why collect student names? The Ministry collects the student name data:

- For data quality work with ENROL
- To assign National Student Numbers (NSN).

Legal student name The legal student name is the student's legal surname, first name and middle names as on the student's birth certificate or passport.

You should enter the student's correct full legal name in the *legal name* field in your SMS

Preferred student name Students may have a preferred name that isn't on the student's birth certificate or passport.

You should enter other names in the preferred name field in your SMS. Never enter a preferred name in the legal name field.

Student types

Introduction The Ministry uses student type data to work out which students to fund. You can assign a student one student type only.

Student types Student types for year 1 to 8 are:

Code	Student type	Count in roll return?
FF	International Fee-paying Student	Yes, as international
EX	Exchange Student	Yes, as regular student
RE	Regular Student	Yes, as regular student
EM	External Student	No
SA	Satellite Class Student	No
NA	Not Attending	No
NF	Not Funded	No
SF	Separately Funded	No

Choosing the right student type Choose the first student type above that applies to your student. The Ministry ranks the student types in the above order.

Note that a year 1 – 8 student will typically only fit into one student type anyway.

International Fee-paying Student (FF) An international student is a student who pays full tuition costs with his or her own funds or sponsored funds.

Exchange Student (EX) An exchange student is a student studying in New Zealand under a New Zealand Government approved programme. Exchange students don't pay tuition fees. You can treat exchange students as regular students in your roll return.

However, you cannot count an exchange student if he or she is in an exchange with a domestic student you still count on your roll.

Continued on next page

Student types, Continued

Codes for exchange schemes

Code exchange students as belonging to either:

- One of the 12 Government-approved Exchange Schemes (e.g. AFS)
- A Government-approved Exchange Agreement (e.g. a school-to-school agreement. Schools should hold documentation to verify this).

Use these codes 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
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)
13	NZ / France Student Exchange - new for 2011
14	Student Exchange Australia New Zealand
15	Tahiti Exchange
Code	Approved School to School Exchange
99	NZ School has a partner school in another country which is approved by the New Zealand government.

Regular Student (RE)

A regular student is a New Zealand student or a student treated as a New Zealand student for funding and staffing purposes. A regular student is also aged less than 19 years at 1 January of the roll count year.

Regular students include:

- students in general classrooms
- students in special education needs units.

Regular students exclude:

- international fee-paying students
- alternative education students
- adult students.

Continued on next page

Student types, Continued

External student (EM)

An external student is a student who attends your school for some courses but attends another school for most of his or her instruction.

Do not count an external student on your roll return. The student's other school should enrol and count the student.

Satellite class student (SA)

Some schools host a special school satellite class for students with special education needs.

Do not count satellite class students count on your roll return. The special school the satellite class belongs too should enrol and count the student.

Not attending (NA) – NEW

Use this student type for students not attending on roll count day if there is no documentation to support his or her absence. The NA code is for temporary absence only. Do not use it for students who have left the school permanently.

Not funded (NF)

Use this student type for students attending school on roll count day that do not receive funding or pay fees. This is typically students on a 28 Day Waiver or an Extended 28 Day Waiver.

Separately funded (SF)

A separately funded student is a student in a separately funded unit. Exclude separately funded students from your roll return.

Teacher losses – Insert E

Introduction The Ministry sends an Insert E with the July 2012 roll return. The Ministry prints the Insert-E with all your permanently-appointed teachers that have come off the Ministry payroll from pay period 4 in May 2011 to before period 4 in May 2012 i.e. the teachers have left the state schooling sector in this period. The Ministry needs you to tell us why these teachers have left.

Note: The Ministry only collects board information from state and state-integrated schools.

Teacher Loss The Ministry knows when a permanently-appointed teacher comes off the Ministry payroll. But the Ministry doesn't know why.

The Ministry asks schools to give a reason for each permanently-appointed teacher that left the state schooling sector.

Note:

- You won't get an Insert-E if no permanently-appointed teachers left your school.
 - The insert-E includes teachers on leave without pay.
 - The Insert-E doesn't include teachers who have left your school to teach at another state school.
-

Collecting Teacher loss data Schools should enter the reason that best describes why each teacher left. Use one of the reasons listed on the form and enter the appropriate code in the Reason field.

Why collect teacher loss data? The Ministry uses teacher loss data:

- in teacher supply work
- to identify teacher employment trends and patterns.

Teacher vacancies in state schools

- Introduction** Vacancies for Full-time Permanent Teachers is in the March 2012 roll return:
- Question six for primary schools.
 - Question seven for intermediate schools.

Note: This question applies to state and state integrated schools only.

- What is teacher vacancy data?** The Ministry would like to know:
- if you have vacancies to re-advertise
 - the number of vacancies you have to re-advertise
 - the number of vacancies you are actively seeking to fill
 - the vacancy details.

Note: A board isn't 'actively seeking to fill' a vacancy if the board is not advertising the vacancy and a limited-term appointee is filling the vacancy.

- Reporting teacher vacancy data** You can only answer this question on the roll return form. Use the codes at the bottom of the page in the roll return form to complete the fields.
-

- Why collect teacher vacancy data?** The Ministry uses teacher vacancy data:
- to find trends in staffing difficulties
 - for teacher supply analysis.
-

Teaching staff at private schools

- Introduction** Teaching staff at private schools is Question four in the March 2012 roll return. You can only answer this question on the roll return form.

Note: This question applies to private schools only.

- Why collect teaching staff at private schools data?** The Ministry uses teaching staff at private schools data, with data from the Ministry's payroll database, to get a fuller picture of total teacher numbers and full-time teacher equivalents in New Zealand schools.
-

- What teaching staff at private schools data** Teaching staff at private schools data is about numbers of full-time and part-time teaching staff at private schools.
-

Tuition Fee (for International Students)

Introduction The Ministry gets tuition fee data from ENROL.

Collecting tuition fee data Enter the weekly tuition fee charged (excluding GST) in your SMS and ENROL for each international fee-paying student. Enter the amount in New Zealand dollars.

Schools that provide scholarships to international students must still report the full tuition costs.

International Student Levy (ISL) and Export Education Levy (EEL) For information about the International Student Levy (ISL) and Export Education Levy (EEL) go to:

- [www.minedu.govt.nz/NZEducation/EducationPolicies/International Education](http://www.minedu.govt.nz/NZEducation/EducationPolicies/InternationalEducation).

For information on how the Ministry deducts the levy refer to the *Funding, Staffing and Allowances Handbook* online at:

- www.minedu.govt.nz/goto/resourcinghandbook.
-

Enquiries Contact Ron Ross, Administrator International Student Levies, if you have questions about tuition fees:

- email ronald.ross@minedu.govt.nz
- telephone (04) 463 8073
- facsimile (04) 499 4532
- Ministry of Education, National Office, PO Box 1666, Wellington.

Tuition weeks (for International Students)

Tuition weeks? The Ministry collects the tuition week data from ENROL.

The Ministry uses the Tuition Weeks data to calculate the international student levy for state schools. The Ministry calculates the levy by multiplying the number of weeks by \$10.73 for primary and intermediate schools.

Current Year Level

Current Year Level The Current Year Level (CYL) goes from Year 1 (previously Primer 1 or J1) to Year 13 (previously Form 7).

Schools decide the Current Year Level for their students. Schools record Current Year Level in ENROL and their SMS's. ENROL and SMS's increase the year level by one at the start of each year. Schools can reset the year level for any student if necessary.

Funding Year Level

Introduction Funding Year Level measures the number of years a student receives schooling. Funding year level provides the Ministry of Education with a way to count students for resourcing that is independent of:

- the way schools organise themselves
- students' programmes of study.

What funding year level is not Funding 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 Current Year Level may be different from his or her Funding Year Level.

Misconceptions Do not base Funding Year Level on:

- a student's fifth birthday since students may start school 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 you've accelerated or held back the student.

Calculating Funding Year Level You would normally base a student's Funding Year Level on the date the student began schooling.

To calculate the funding year level, check the student's First schooling date:

If the first schooling date is:	Then Funding Year is:
on or before 1 July	1
after 1 July	0

The student keeps this Funding Year for the rest of the calendar year. In January of the next year increase every student's Funding Year by one.

Your school's SMS calculates Funding Year Level using these rules.

Continued on next page

Funding Year Level, Continued

Examples of Funding Year Level calculation

Example 1: Tim started school for the first time on 15 May 2010. His Funding Year was Year 1 for the rest of 2010. In January 2012 he went up to Year 2. In 2013 he will be in Year 3.

Example 2: Aroha started school for the first time on 2 July 2011. Her Funding Year was Year 0 for the rest of 2011. In January 2012 she went up to Year 1. In 2013 she will be in Year 2.

Example 3: Susan transferred to your school from another school on 10 August 2011. Her First schooling date (at her previous school) was 5 June 2009. Therefore in 2012 her Funding Year is Year 4, having started school for the first time as a Year 1 in 2009.

Example of wrong calculation: Susan (above) started at this school on 10 August 2011. If using her First Attendance date (at this school) instead of her First schooling date (at her previous school), she would register as Funding Year Level 1 in 2012. This calculation is wrong.

Students moving from another school

Be sure to use the date a student first started school when a student moves from another school i.e. do not use the date the student starts at your school.

Students starting school after age six

When a student starts school after the compulsory starting age of six you have two choices:

1. Use the student's sixth birthday as the first schooling date. You can use this date to work out the student's funding year level.
2. Otherwise choose the Funding Year Level the majority of students of the same age have.

These rules apply to migrant children and previously home-schooled students.

Re-setting Funding Year Level

You can only reset a student's Funding Year level at Year 7, Year 8 and Year 9:

- Students in their final two years of primary and intermediate schooling must have their Funding Year Level set at Year 7 and Year 8 to calculate the correct funding and staffing for technology.
 - Set the funding year level for all students in their first year of secondary level schooling to Year 9.
-

Zoning status

Introduction	<p>Zoning status only applies to state (non-integrated) schools with an approved enrolment scheme.</p> <p>A student's zoning status shows whether he or she lived inside or outside your school zone on his or her start date. You should base a student's zoning status on his or her address on his or her start date at your school.</p> <p>A student's zoning status cannot change while he or she is enrolled at your school.</p> <p>A student's zoning status can change if he or she enrolls at another school and then re-enrolls at your school. You can base the student's new zoning status on his or her address on the new start date.</p>
Why collect zoning status data?	<p>The Ministry collects zoning status data from relevant schools to help the Ministry decide on accommodation provision.</p>
Does my school have an enrolment scheme?	<p>You should know if your school has a Ministry-approved enrolment scheme. If you are in any doubt, contact your local office or refer to:</p> <ul style="list-style-type: none">• www.schoolzones.co.nz. <p>Private schools do not have Ministry-approved enrolment schemes.</p>
Enrolment scheme vs. Zoning	<p>Kura Kaupapa Māori, designated character schools, special schools and state integrated schools may have approved enrolment schemes, but they will not have school zones. Therefore these schools do not need to provide zoning status data.</p>

Continued on next page

Zoning status, Continued

Recording zoning status

Schools can choose from three codes when setting a student's zoning status:

Code	Name	Description
INZ	In zone	Student lives inside the school's zone on the date of: <ul style="list-style-type: none">• first attendance• re-enrolment after the student has left the school and returned.
OUTZ	Out of zone	Student lives outside the school's zone on the date of: <ul style="list-style-type: none">• first attendance• re-enrolment after the student has left the school and returned. <p>Count all adult students as out of zone.</p>
NAPP	Not applicable	Zoning status doesn't apply to the student.

Who is coded NAPP?

Schools must code the following students as NAPP (Not applicable):

- All students whose date of first attendance at your school is before the effective date of your school's enrolment scheme
- All international fee-paying students and students attending your school but enrolled elsewhere
- Students that are boarding at the school hostel.

Schools with SMS's

You should be able to enter whether your school has an enrolment scheme in your SMS.

Your SMS should automatically default your students to 'not applicable' (NAPP) if you do not have an enrolment scheme.

More information

You can find more information at:

- www.minedu.govt.nz/goto/enrolmentschemes.

Appendix F – Statistics New Zealand ethnicity list

Ethnic group for Roll Returns

Use the ethnicity list below if you complete your roll return by hand. Start at the top of the ethnicity list and use the first ethnicity that applies to your student. Then look to the right-hand column for the ethnic group for your student.

Code	Ethnicity list	Ethnic group for reporting
211	Māori	Māori
351	Tokelauan	Tokelauan
361	Fijian	Fijian
341	Niuean	Niuean
331	Tongan	Tongan
321	Cook Island Māori	Cook Island Māori
311	Samoan	Samoan
37	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	Middle Eastern
521	Latin American	Latin American
531	African	African
611	Other ethnicity	Other
999	Not stated	
128	Australian	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

Useful Links

Roll Return Links	Documents at this website
www.educationcounts.govt.nz/goto/guidelines	<ul style="list-style-type: none"> • Full Roll Return Guidelines 2012. • Enrolment form guidelines. • Code Sets.
Other Links	
www.minedu.govt.nz/Circulars	Education circulars
www.minedu.govt.nz/goto/resourcinghandbook	Resourcing handbook
www.minedu.govt.nz/goto/sms	Information on SMS project initiatives
www.educationcounts.govt.nz/goto/smsrollreturns	SMS Roll Return manual
www.minedu.govt.nz/goto/enrol	ENROL help and FAQ's
www.educationcounts.govt.nz/statistics/schooling	School numbers and names

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