(GBR) HESA Updates for Bundle 32

Bundle 32 includes changes for HESA regulatory updates 2013/14 and DLHE. This document explains these changes.

See also
Specifications for 2013/14 returns on HESA website

Updates to Import HESA Codes Page

Access the Import HESA Codes page (Records and Enrollment, HESA Reporting, Codes and Mappings, Import HESA Codes).

You can use the Import HESA Codes process to import the new fields from the CodeLists.xsd files.

Notes

- When importing codes for MOBTYPE, the process imports the same codes and descriptions for MOBTYPE2 and MOBTYPE3.
- For the Student return (Cnn051CodeLists.xsd), the process is updated to create the codes for the INITIATIVES2 field in addition to the INITIATIVES field.
- The codes for some fields in the ITT return are either identical to, or a subset of, the codes in the Student return. For such fields, the process does not import the codes for the ITT return. The import process is updated so that for an ITT code list (Cnn053CodeLists.xsd) the following codes are not imported:
    - DISABLE
    - DISALL
    - ETHNIC
    - FUNDCODE
    - ITTPHSC
    - ITTSCHMS
    - MODE
    - PGCECLSS
    - PGCESBJ
    - RSNEND
    - SBJCA
    - SEXID
    - TTCID
    - UNITLGTH
- The import process is updated so that from a KIS code list file (Cnn061CodeLists.xsd), codes for this field are not imported: TTCID (same codes as Student return).

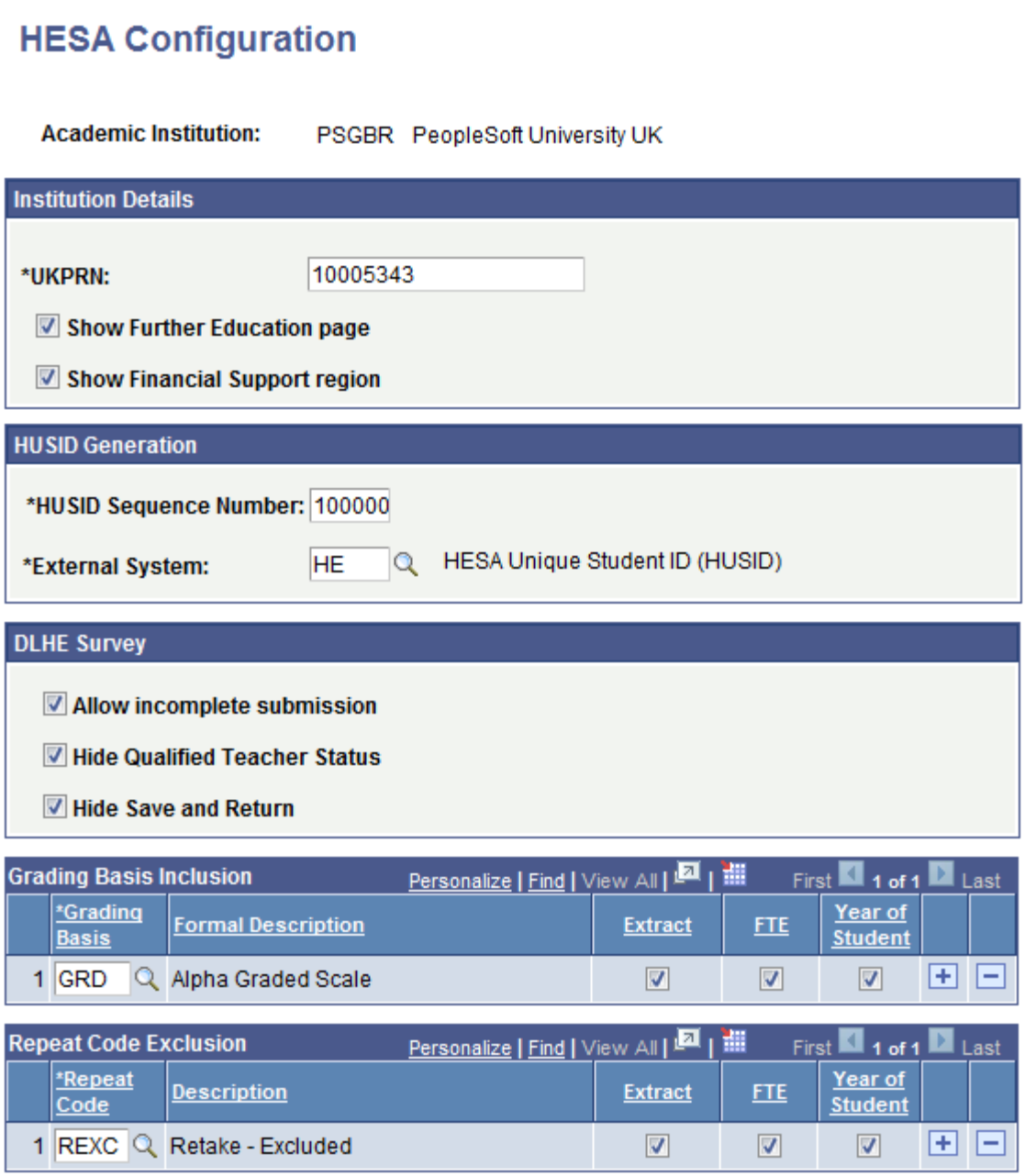
Updates to Code Mapping Pages

Access the Code Mapping component (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings).

On all the Mapping pages, such as the Ethnicity mapping page, the dropdown values will now display both the inactive and active codes. For example, if you use the Ethnic Groups page (Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups) to set the *ABC* ethnic group as inactive, the system will still continue to display *ABC* as the prompt value for the Ethnic Group field on the Ethnicity mapping page.

Updates to HESA Configuration Page

Access the HESA Configuration page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Configuration, HESA Configuration).



HESA Configuration page

The Enable Further Education page check box is renamed Show Further Education page.

The Show Financial Support Region check box is added.

Show Financial Support region	Select to enable the Financial Support region in HESA Instance Details component. Institutions in England can select this check box and institutions in Scotland, Northern Ireland and Wales can deselect this check box.

Two check boxes - Hide Qualified Teacher Status and Hide Save and Return - are added to the existing DLHE Survey region.

Hide Qualified Teacher Status

If you select this check box, the system does *not* display the following on both student and admin versions of the survey:

- Your Education Summary region in Section A
- Help text and the Newly Qualified Teacher Status check box in Section C (however, admin users can still update the Newly Qualified Teacher Status checkbox on the Survey Details page).

Hide Save and Return

If you select this check box, the system does *not* display the Save and Return button and the Cancel button on each section of the student version of the survey (but the system will display the Save button on the admin version of the survey).

Restricting Access to Person HESA Data Fields

Access the Fields page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Fields).

Fields

Field: RELBLF

Description: Religion or belief

Long Description: Religion or belief

HESA Data Type: RELBLFCodeType

Field Type: Text Text Data Type

Field Length: 2.0

Source: Seeded

***Display Region:** Restricted ☑ **Active**

☐ **Fixed**

Available at

☐ **Institution**

☑ **Student**

☐ **Instance**

☐ **Advisor**

☐ **Program**

☐ **Program Offering**

☐ **Program Offering Year**

☐ **Plan**

☐ **Plan Offering**

☐ **Plan Offering Year**

☐ **Subplan**

☐ **Sub-Plan Offering**

☐ **Sub-Plan Offering Year**

☐ **Module**

Fields page

You can now use the Fields page to restrict access to Person HESA Data fields used for creation of Student entity.

To restrict access, you can now select a value for the Display Region field if the system has selected the Available at check box for Student. The Display Region field remains read-only for all other fields.

Display Region This field is available for edit only if the system has selected the Available at check box for Student level data capture. Three

values are delivered: *Restricted*, *Other* and *Not Displayed*.

If you select *Other*, the field will be available only on the HESA Student Data page where you can capture the field's value.

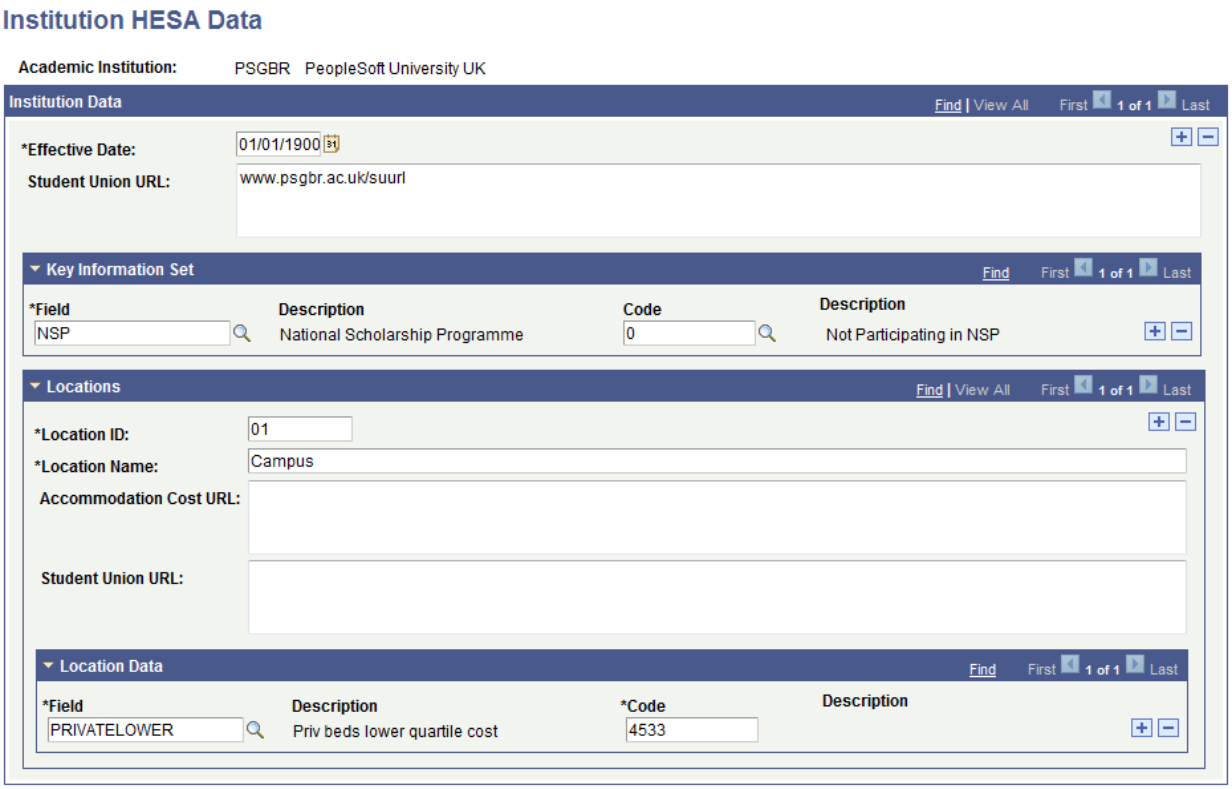
If you select *Restricted*, the field will be available only on the HESA Restricted Data page where you can capture the field's value.

If you select *Not Displayed*, you cannot capture any new values for the field on the HESA Student Data page but the page will continue to display any existing values for the field.

You can restrict the following delivered fields: DISABLE, ETHNIC, GENDERID, NATION, NATIOND, RELBLF, SDEPEND, SEXORT, TTACCOM, TTPCODE and WELSPP.

Updates to Institution HESA Data Page

Access the Institution HESA Data page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Institution Data).

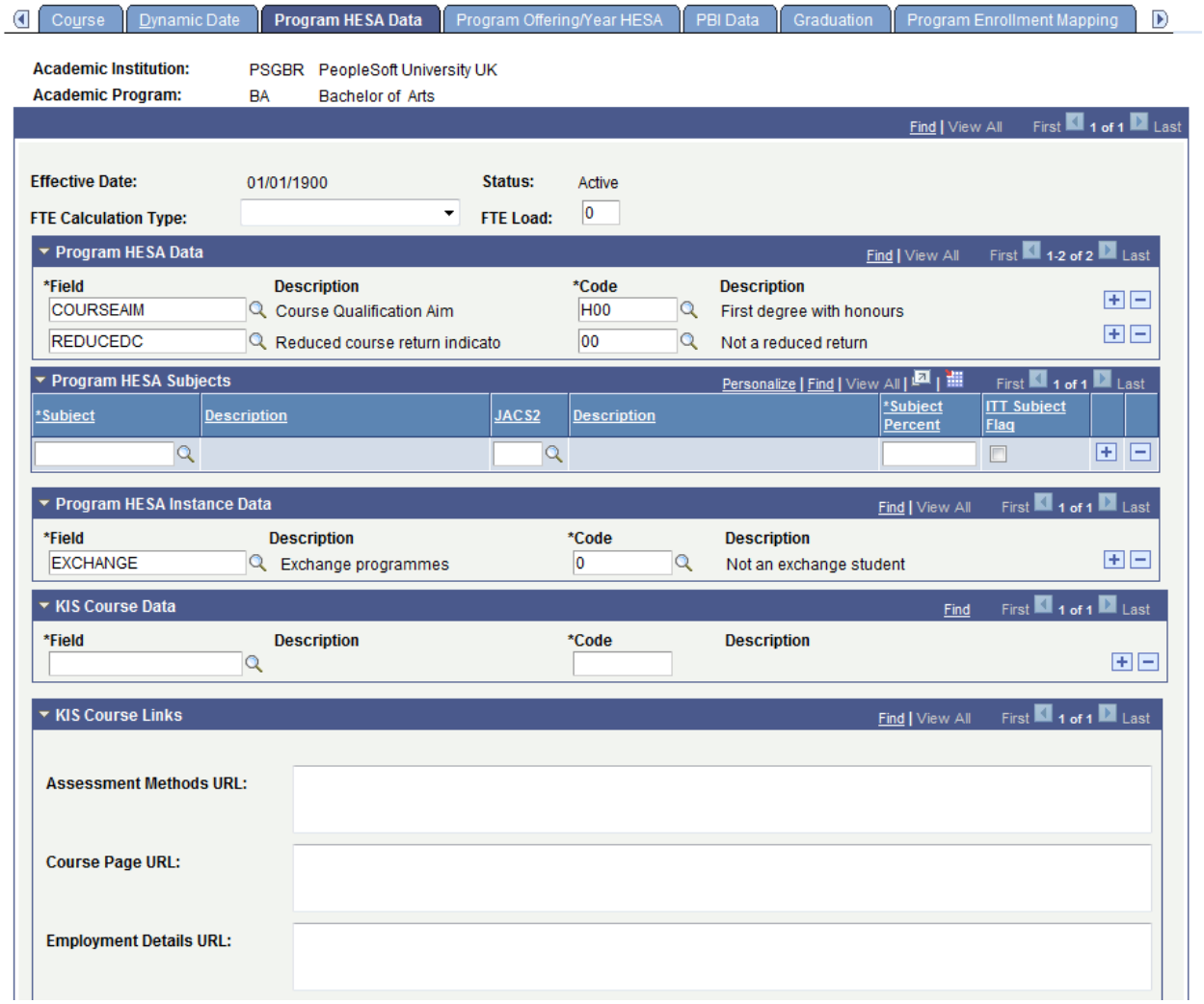


Institution HESA Data page

Student Union URL field is added to the Locations group box.

Updates to Program HESA Data Page

Access the Program HESA Data page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Program HESA Data).



Program HESA Data page (1 of 2)

Learning/Teaching Methods URL:

Support Details URL:

Stage Modules — Personalize | Find | First 1-4 of 4 Last

*Stage	*Course ID	Description	*Offer Nbr	FTE Load	Coursework	Written Exam	Practical Exam	Scheduled Study	Independent Study	Placement Study
1	666683	Introductory Accounting I	1	20	70	20	10	30	50	20
1	666684	Introductory Accounting II	1	15	20	30	50	80	15	5
1	666685	Accounting Information Systems	1	25	40	50	10	30	45	25
2	666684	Introductory Accounting II	1	15	20	30	50	80	15	5

Course Stages — Find First 1-2 of 2 Last

*Stage	*Assessment Method	Coursework	Written Exam	Practical Exam	*Learning/Teaching Method	Scheduled Study	Independent Study	Placement Study
1	A Based on actual student choice	0	0	0	E Based on institutional estimat	0	0	0
		45.00	35.00	20.00		42.50	39.17	18.33
2	E Based on institutional estimat	0	0	0	A Based on actual student choice	0	0	0
		20.00	30.00	50.00		80.00	15.00	5.00

Accreditation — Find | View All First 1 of 1 Last

*Accreditation Type: Dependency

Program HESA Data page (2 of 2)

Stage Modules group box is added.

Stage Modules

This group box enables you to define the course offerings associated with each stage of the course and displays the FTE and assessment and teaching/learning values defined for each course offering in the HESA Module Data record.

Course Stages

The new read-only row in this group box displays the weighted averages (by FTE) for the six % percentage fields based on any records added to the Stage Modules group box.

For example, based on the modules defined in the Stage Modules group box of the example graphic, the row for Stage 1 in the Course Stages grid would include read-only percentage fields below the updatable fields for Coursework, Written Exam, Practical Exam, Scheduled Study, Independent Study and Placement Study.

Each of the fields contains the average weighted by FTE for that element to 2 decimal places, for example, the weighted average value for Coursework from the records shown below would be FTE of each module multiplied by the Coursework value for each module. The total for all the modules would then be divided by the total FTE to get the average:

FTE for 666683 * Cwk = 20* 70 = 1400

+

FTE for 666684 * Cwk = 15 * 20 = 300

+

FTE for 666685 * Cwk = 25 *40 = 1000

Total = 2700

The total 2700 would then be divided by the total FTE of all the modules, i.e. 65.

= 2700/60= 45

The same applies to each of the six fields to give the totals shown above.

You could then decide to (a) add percentage integer values in the updatable fields using the module averages as a guide, e.g. for Stage 1 add values 43, 39, 18 for Scheduled Study, Independent Study and Placement Study as the module averages rounded to make 100 total, and those values would be derived in the extract or (b) leave all the updatable fields are zero, in which case, if Stage Modules records had been defined, then the values would be derived based on the weighted averages from the modules rounded to the nearest integer with some adjustment to ensure that the total of each group of three fields equals 100. If the updatable fields were all zero and no Stage Modules were defined then each of the fields would be derived as zero.

Updates to Program Offering/Year HESA Page

Access the Program Offering/Year HESA page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Program Offering/Year HESA).

You can select INTERCALATE field in the Program Year HESA Data group box.

Updates to Plan HESA Data Page

Access the Plan HESA Data page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan HESA Data).

Changes made to the Program HESA Data page are also made to this page. Note that like the other existing KIS group boxes, the system enables the new Stage Modules group box only if KIS Type has a value or at least one of the child subplans has a KIS Type value.

An additional change is that you can select OWNCOURSEID field on this page.

Updates to Plan Offering/Year HESA Page

Access the Plan Offering/Year HESA page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan Offering/Year HESA).

You can select INTERCALATE field in the Plan Year HESA Data group box.

Updates to Sub-Plan HESA Data Page

Access the Sub-Plan HESA page (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan HESA).

Changes made to the Program HESA Data page are also made to this page. Note that like the other existing KIS group boxes, the system enables the new Stage Modules group box only if KIS Type has a value.

An additional change is that you can select OWNCOURSEID field on this page.

Updates to Sub-Plan Offering/Year HESA Page

Access the Sub-Plan Offering/Year HESA page (Set Up SACR, Foundation Tables, Academic Structure, Academic SubPlan Table, Sub-Plan Offering/Year HESA).

You can select INTERCALATE field in the SubPlan Year HESA Data group box.

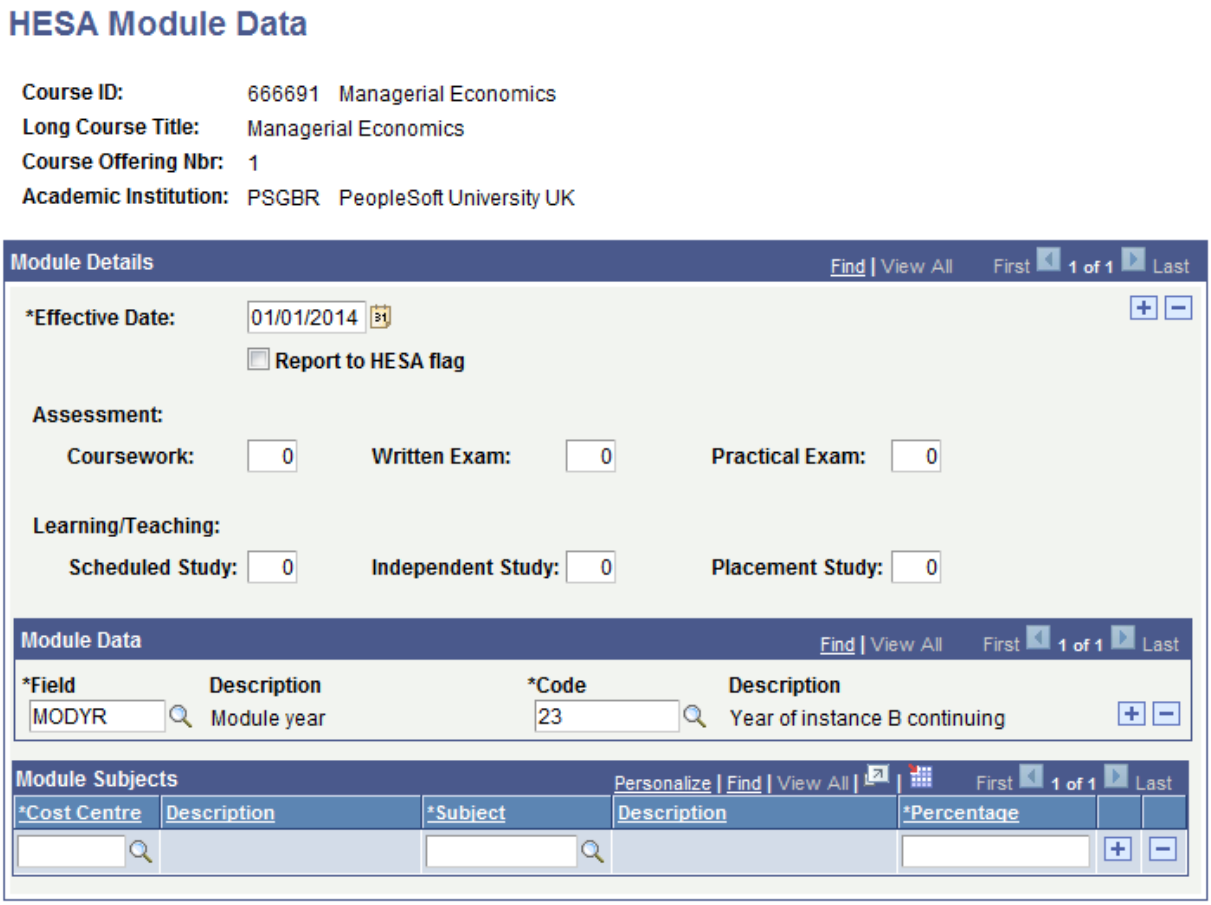
Updates to Create HESA Module Data Page

Access the Create HESA Module Data page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Create Module).

The Create HESA Module Data process now sets the KIS Course Stage fields such as COURSEWORK, PRACTICAL, WRITTEN to zero in the record that it creates.

Updates to HESA Module Data page

Access the HESA Module Data page (Curriculum Management, Course Catalog, HESA Module Details).

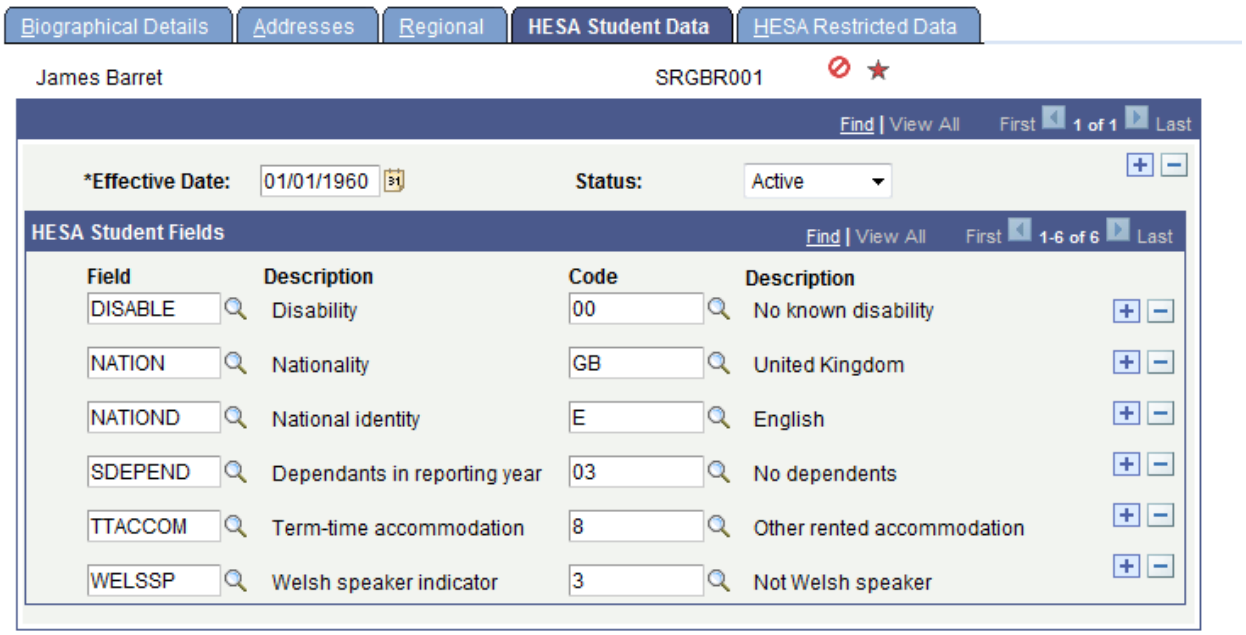


The KIS Course Stage fields, which already exist in the Course Stages region of the Program, Plan and Sub-Plan HESA data pages, are added to the Module Details region.

Updates to Person HESA Data Page

The Person HESA Data page is renamed *HESA Student Data*.

Access the HESA Student Data page (Campus Community, Personal Information, Add/Update a Person, HESA Student Data).

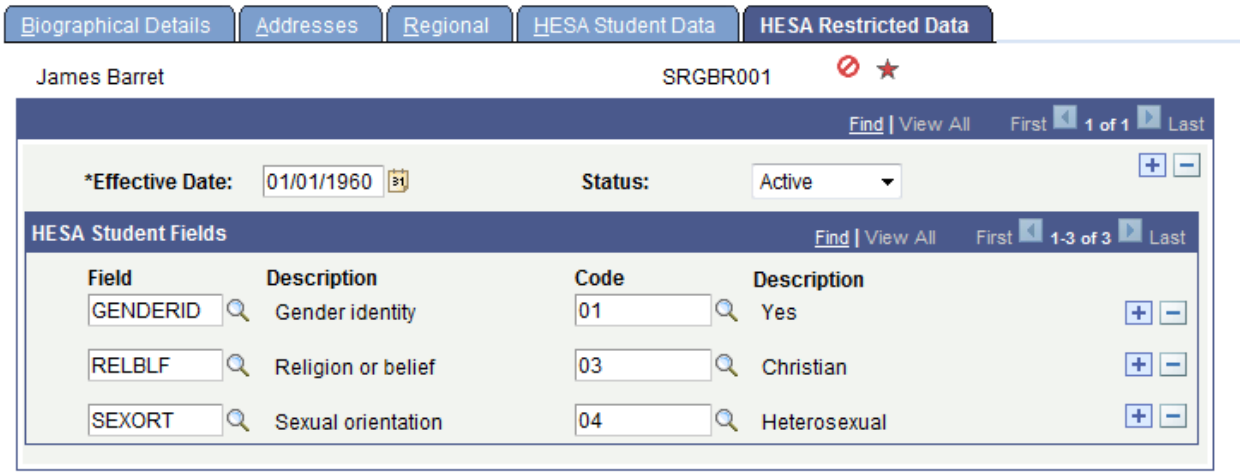


HESA Student Data page

With this bundle, on this page, you can select only those fields for which the Display Region is set up as *Other* on the Fields page. The fields that have Display Region as blank will be displayed on this page if they have any values but you cannot select those fields.

New Page - HESA Restricted Data Page

Access the HESA Restricted Data page (Campus Community, Personal Information, Add/Update a Person, HESA Restricted Data).



HESA Restricted Data page

Use this page to view, enter or modify Person HESA Data record values for fields that are restricted through the Fields page. The system can use these values for creating Student entity data at the student level (for the Student and ITT returns).

On this page, you can select only those fields for which the Display Region is set up as *Restricted* on the Fields page.

Access to the HESA Restricted Data page can be controlled through the PeopleTools Permission List setup:

- Menu Name: CC_BIO_DEMO_DATA – Bio/Demographic Data
- Component Name: SCC_BIO_DEMO – Add/Update a Person

Updates to HESA Instance Page

Access the HESA Instance page (Records and Enrollment, Career and Program Information, HESA Instance Details, HESA Instance).

HESA Instance | Mobility | Entry Profile | Further Education

Name: Fredrich Jones
ID: SRGBR002
Academic Career: Undergraduate
Student Career Nbr: 0
Car Req Term: Acad year 2007-2008
Academic Institution: PeopleSoft University UK
Status: Completed
Academic Program: Bachelor of Science
Student Program

Instance HESA Data — Find | View All — First 1 of 1 Last

*Effective Date: 01/08/2012
Instance Identifier: UGRD02007
Academic Plan:
Start Date of Instance: 01/08/2012
Linked Career:
Year of Student: 3
Linked Career Number:
Year of Program: 4
HIN Population Year: 2014
Report to HESA

Instance Details — Find — First 1-2 of 2 Last

*Field	Description	*Code	Description
FEEELIG	Fee eligibility	1	Eligible to pay home fees
LOCSDY	Location of study	H	Classroom

Financial Support — Personalize | Find | View All — First 1 of 1 Last

*Type	Description	*Amount
01	Cash	554

Qualifications Awarded — Personalize | Find | View All — First 1 of 1 Last

Award | Teaching Qualification

*Qualification Awarded	Description	Classification	Description	Outcome of ITT Instance	Description
J10	Foundation degree	01	First class honours	1	Awarded QTS

Research Data — Personalize | Find | View All — First 1-2 of 2 Last

REF Unit	Description	RAE Unit	Description	*Percentage
08A	Chemistry - A			90.0
09B	Physics - B			70.0

FTE Details — Personalize | Find — First 1 of 1 Last

*Reporting Period	Calculated FTE	Override FTE	Report Zero
2013/14		100.0	

HESA Instance page

The Financial Support region is added. The page displays the Financial Support region if you have selected the Show Financial Support region check box on the HESA Configuration page. The system uses the values that you enter in this region to create the Financial Support entity.

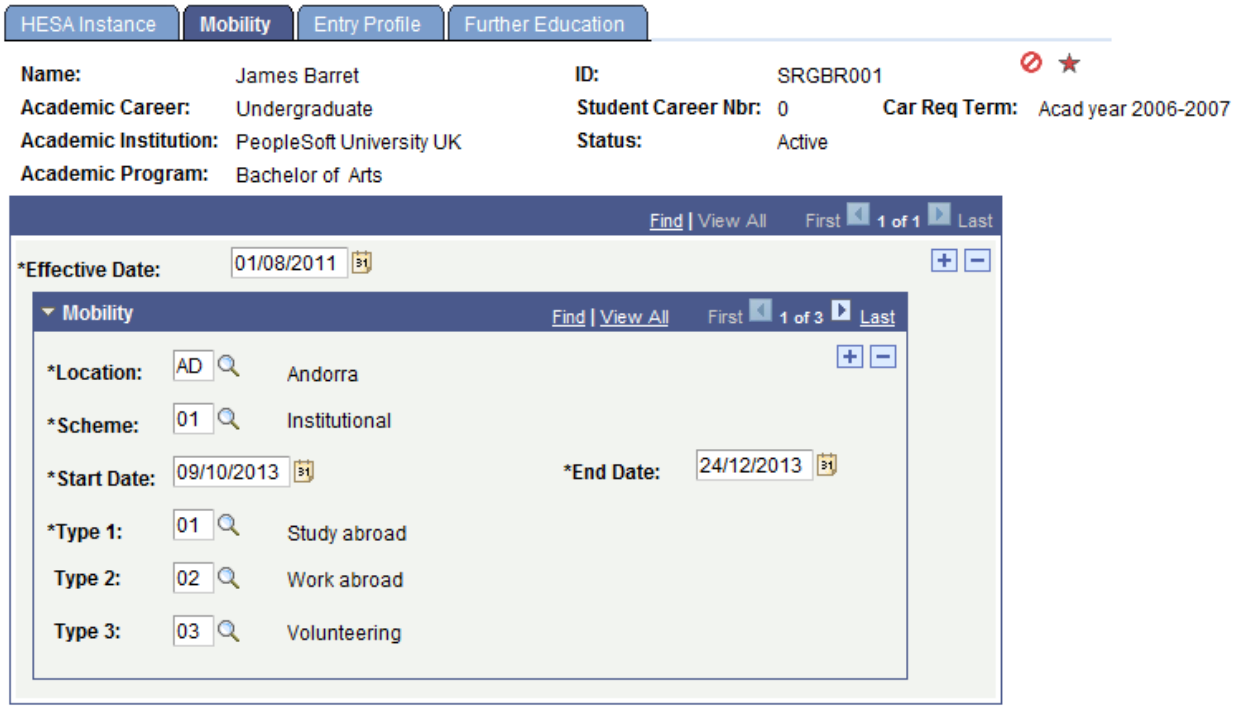
Changes to the Research Data group box: The REF Unit field is added. The RAE Unit of Assessment field is renamed to RAE Unit. The Unit of Assessment Percentage field is renamed to percentage.

In the Research Data group box, the combination of REF Unit and RAE Unit must be unique and at least one value must be defined (either REF Unit or RAE Unit) along with Percentage to save a record.

You can select ELQ and INTERCALATE fields in the Instance Details group box.

New Page - Mobility Page

Access the Mobility page (Records and Enrollment, Career and Program Information, HESA Instance Details, HESA Instance).



Mobility page

Use this page to enter or modify values that the system can use to create Mobility entity data.

The combination of Location, Scheme and Start Date must be unique.

Type 1	Select a MOBTYPE code.
Type 2	Select a MOBTYPE2 code. This field becomes available only if you have selected a value for the Type 1 field. The Type2 and Type 1 values cannot be the same.
Type 3	Select a MOBTYPE3 code. This field becomes available only if you have selected a value for the Type 2 field. The Type 3, Type 2 and Type 1 values cannot be the same.

Updates to Entry Profile Page

Access the Entry Profile page (Records and Enrollment, Career and Program Information, HESA Instance Details, Entry Profile).

You can select CARELEAVER field in the Entry Profile region.

You can set the Sitting field in the Entry Qualifications region to blank.

Updates to Further Education Page

Access the Further Education page (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education).

HESA Instance | Mobility | Entry Profile | **Further Education**

Name:	James Barret	**ID:**	SRGBR001		
Academic Career:	Undergraduate	**Student Career Nbr:**	0	**Car Req Term:**	Acad year 2006-200
Academic Institution:	PeopleSoft University UK	**Status:**	Active		
Academic Program:	Bachelor of Arts				

Find | View All First 1 of 4 Last

*Effective Date: 15/11/2013

Instance Details Find First 1-2 of 2 Last

*Field	Description	*Code	Description
FUNDMODEL	Funding model	45	Employer Responsive
PROGTYPE	Programme type	16	Diploma - level 2 (higher)

Employment Status Find | View All First 1 of 1 Last

Record Number 1

*Employment Status 10 In paid employment *Status Date 04/11/2013

Employer ID Workplace Postcode

Employment Monitoring Personalize | Find | View All | First 1-2 of 2 Last

Record Number	*Type	Description	*Code
1	LOE	Length of employment	01
1	RON	Risk of NEET	02

Funding and Monitoring

Learner Personalize | Find | View All | First 1-2 of 2 Last

Type	Description	*Code
ALS	Learning Support	01
NLM	National learner monitoring	01

Learning Delivery Personalize | Find | View All | First 1-2 of 2 Last

Type	Description	*Code	Date From	Date To
ALB	24+ Advanced learning loan bursary fund	02	12/02/2013	14/05/2013
LSF	Learning support funding	01	13/11/2012	03/11/2013

Further Education page

You can select these new fields in the Instance Details region: FUNDADJOTH, FUNDADJPRIOR, PARTNERUKPRN, PLANEEPHOURS and PLANLEARNHOURS

Two new optional fields (for LEARNDELFAMFROM and LEARNDELFAMTO derivation) are added to the Learning Delivery region: Date From and Date To.

Updates to Calculate Full-Time Equivalence Page

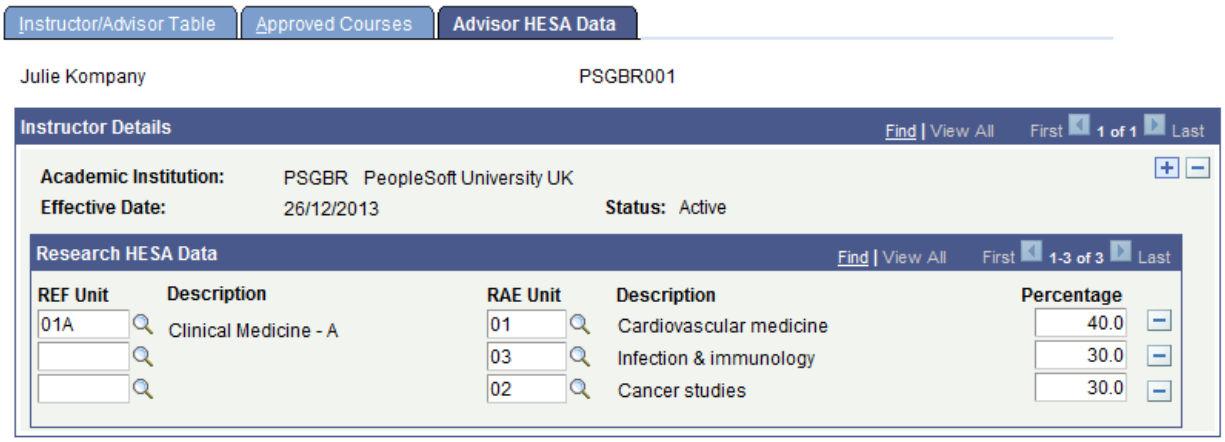
Access the Calculate Full-Time Equivalence page (Records and Enrollment, HESA Reporting, Extract Processing, Calculate FTE).

The following update has been made to the Calculate FTE process, when the FTE calculation type = Derive load from Modules:

If the Class Drop Date is before the reporting period start date, update Class FTE to zero.

Updates to Advisor HESA Data Page

Access the Advisor HESA Data page (Curriculum Management, Instructor/Advisor Information, Instructor/Advisor Table, Advisor HESA Data).



Changes made to the Research Data group box in the HESA Instance page are also made to this page.

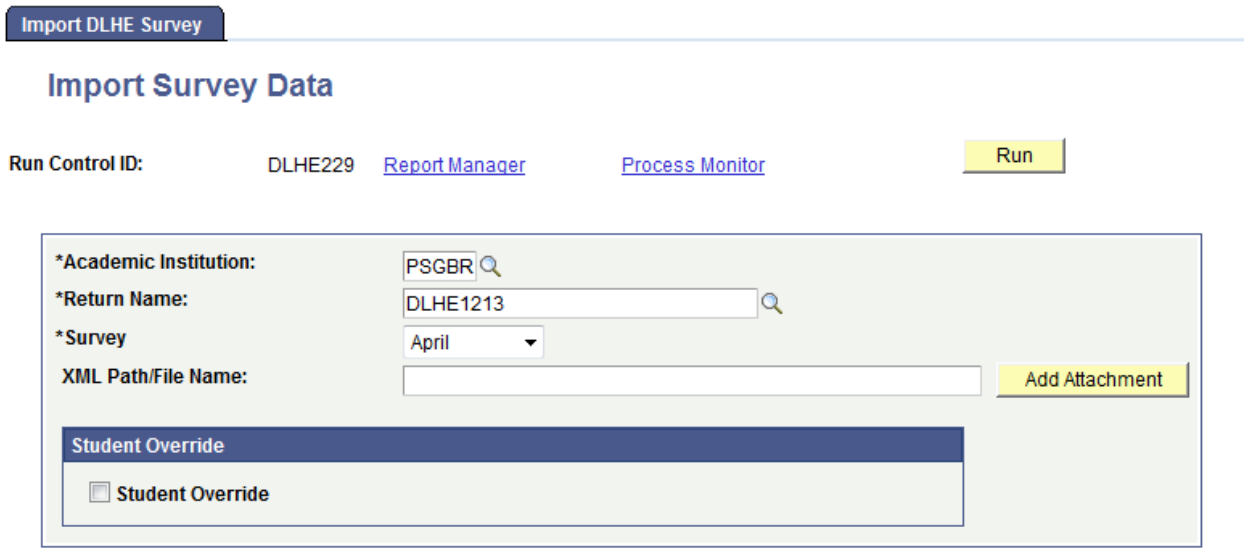
On this page, you can enter a maximum of three units. The total percentage for the three subjects must equal 100.

The combination of REF Unit and RAE Unit must be unique and at least one value must be defined along with Percentage to save a record.

DLHE Updates

New Page - Import Survey Data Page

Access the Import Survey Data page (Records and Enrollment, HESA Reporting, Destination of Leavers, Import Survey Data).



Import Survey Data page

Use this page to run the process to import DLHE surveys through a staging record.

The fields are similar to the existing Import POPDLHE Survey Target List.

The XML Path/File Name field is optional and you can set it to blank to clear the existing imported staging records.

Note: Before running the Import Survey Data process, create blank survey records (that is, records with survey status = *New*) in Campus Solutions using either the Identify DLHE Target Population process or the Import HIN Target Population process. The Import Survey Data process will match the incoming survey data to the existing survey record and add the student's responses. The Import Survey Data process will set the survey record to *Submitted* or *Saved* depending on whether or not the incoming survey is complete. If there is no matching survey record, then the incoming survey will be saved as a pending staging record and you can use the staging page to add the required Student Program data to create a new survey record.

Processing steps

The process performs the following steps:

1. Deletes existing staging records

The process deletes any existing staging records for the institution where import status is *I* (imported) or *O* (obsolete). Existing non-imported staging records can be updated to staging status = *O* (obsolete) through the DLHE staging data page.

2. Creates staging records

The process creates staging records based on the records in the XML file. The <OWNSTU> value is used as the EMPLID. If no <OWNSTU> element is found, the record is not processed.

For each record found in the XML file, if the Survey parameter is *April,* the process checks for the APRJAN value. If the APRJAN value of the incoming record is *1*, the processing for the record is continued. Otherwise, the process skips the record and moves to the next record.

If the Survey parameter is January and if the APRJAN value of the incoming record is *2*, the processing for the record is continued. Otherwise, the process skips the record and moves to the next record.

If EMPLID values have been defined for the Student Override parameter, only records with a matching OWNSTU are imported.

If there is an existing staging record for the combination of EMPLID, Institution, Return Name and Survey (APRJAN), the process deletes the existing staging record and creates a new staging record. If staging record does not exist for the incoming record, the process creates a new staging record with import status = *N* (new).

If an XML element is not present in the XML file, then the process sets the staging field to blank (character fields) or zero (number fields).

The SSR_HE_HUSID staging field defaults to the most recent effective dated HUSID external system ID for the EMPLID. The External System ID type for HUSID is defined for the institution in the HESA Configuration record. If no HUSID is found then the field is saved as blank and a value can be added via the staging data page once a HUSID external system ID has been added.

The process always sets the SSR_HE_METHOD to *04* (electronic reply) and SSR_HE_SOURCE to *H* (HESA survey).

Values of *X* or *x* are not imported for SSR_HE_MIMPACT.

SSR_HE_FOLLOWUP is set to *N* if the imported value is *1* and set to *Y* if the imported value is *0*.

3. Processes staging records

For each staging record:

The process matches to existing survey records in the database for the combination of Institution, EMPLID, Return Name and Survey (APRJAN) value. If there is a single existing student survey record with survey status (SSR_HE_SURV_STATUS) = *N* (new), it updates that survey record with the values from the staging record and sets staging status to *I* (imported).

If there are multiple existing survey records with survey status = *N* (i.e. new surveys for different Careers/Numbers), the process makes no update, more information is required to identify the correct survey to update for the ID. It sets the staging status to *P* (pending) for the records.

If there is one or more existing student survey records with survey status other than *N*, the process makes no update and sets the staging status to *P* (pending).

If there is no existing survey record and if all the following required values are defined for the staging record, the process creates a new survey record with Survey Status of either *Submitted* or *Saved*:

- Institution (INSTITUTION)
- ID (EMPLID)
- Return Name (SSR_HE_RET_NAME)
- Survey (SSR_APR_JAN)
- Academic Career (ACAD_CAREER)
- Student Career Nbr (STDNT_CAR_NBR)
- HUSID (SSR_HE_HUSID)
- Instance Identifier (SSR_HE_NUMHUS)

After creation of a survey record, it sets the import status to *I* (imported).

If there are missing required values to create a new survey and if the existing import status is *N*, it sets the status to *P* (pending). If there are missing required values to create a new survey and the existing import status is not *N*, then the record is pending from a previous run.

The Survey Status is set to *Submitted* if the imported completion status is *04* (complete), otherwise the status is set to *Saved*.

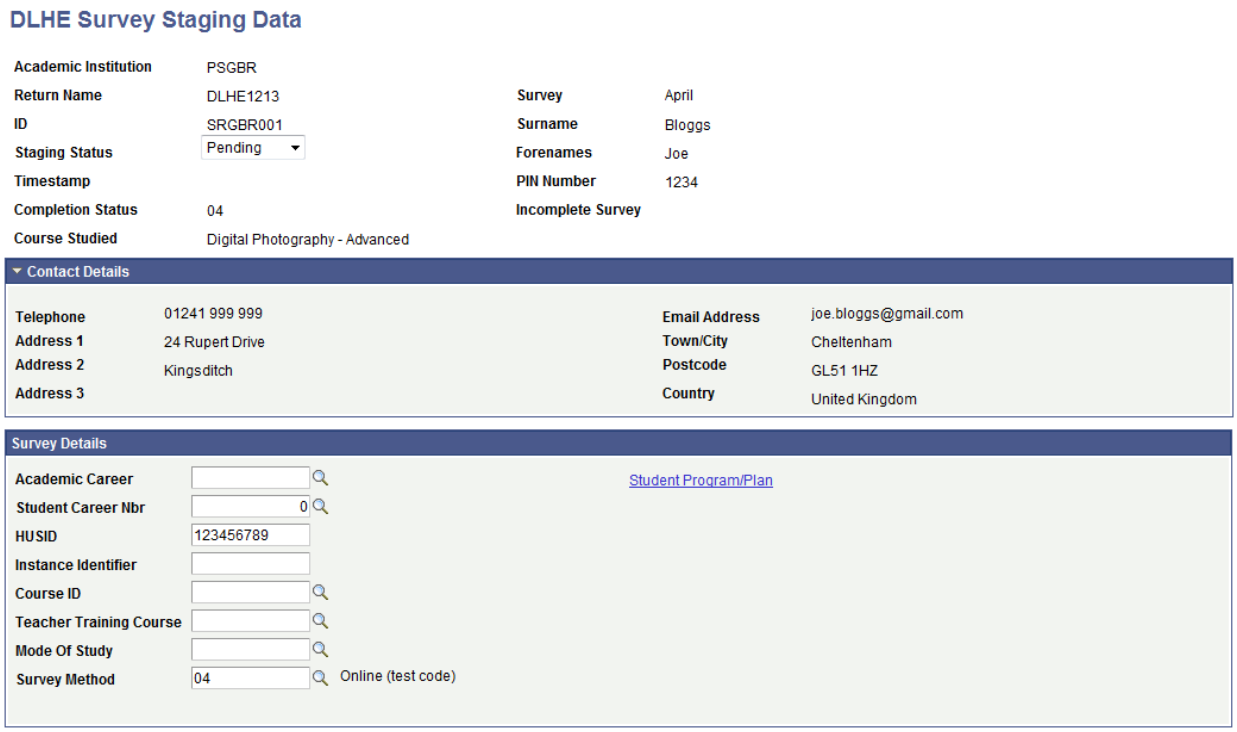
The Part-Time flag is set based on any Mode Of Study value added for the staging record in the same way as for the Import HIN Target Population process.

The QTS flag is set if a Teacher Training Course (TTCID) value of *1* is added for the staging record or if any of the Section C teaching questions has a value.

The administrative coding fields are all set to blank as these values are not provided in the XML file.

New Page - Survey Staging Data Page

Access the Survey Staging Data page (Records and Enrollment, HESA Reporting, Destination of Leavers, Survey Staging Data).



Survey Staging Data page

Use this page to review and update the data that the Import Survey Data process places in the staging table.

Staging Status

This field is available for edit if the status is not *Imported.*

The following statuses are available:

Pending: Record has not yet been added to the database. For pending records, you can add the required values to create a

	new survey record. Refer to the previous topic Importing DLHE Survey Data for the required values. *Imported*: Record has been added to the database. All fields on the page are read-only if the staging status is *Imported*. These records will be deleted on the new run of the Import Survey Data process. *Obsolete*: Record is not needed. The Staging Status field can be set to *Obsolete* to allow the record to be deleted on the next run of the Import Survey Data process.
HUSID	The HUSID for the student is defaulted for new staging records so in most cases the value should already be populated in this field. If the HUSID has been added or changed after the staging record was created, the value can be added or changed here. Refer to the previous topic Importing DLHE Survey Data for information on how the system adds the defaults value to this field.
Instance Identifier	The system populates the value by default from the HESA Instance record for the selected Career/Career Number. Change the value if the default does not exist.
Course ID	Optional to create a new survey record.
Teacher Training Course	Optional to create a new survey record. The system uses this value to set the QTS flag.
Mode Of Study	Optional to create a new survey record. The system uses this value to set the Part-Time flag.
Survey Method	The system enters the default value of *04* for new staging records. Update the value, if required.

New - Survey Link Pagelet

The Enter DLHE Survey link for students to complete the survey appears in the Academics region of the Student Center. A new DLHE Survey pagelet is available that academic institutions can deploy on a dashboard or portal as appropriate.

To add the pagelet to a dashboard, access the pagelet setup for the dashboard (PeopleTools > Portal > Dashboard > Manage Dashboard Pages > Pagelets). In the Campus Solutions region on the Content tab select the check box for Destination of Leavers Survey.

The Enter Survey link appears on this new pagelet only if the survey status is *New* or *Saved* (that is, the status is not *Submitted*, *Coded*, *Duplicate* or *Excluded*) and the current date falls within the survey start and end dates defined in HESA Returns setup.

If multiple open surveys are available, the system displays each survey record to allow selection of one survey.

The instruction text is displayed from the description of PeopleTools Message Catalog's message number 476 from message set 14720 and can be updated if required.

When the student accesses the survey from the new pagelet and then selects the Cancel button, Save and Return button or Submit button on the survey pages, the system displays the pagelet rather than the Student Center.

Updates to Enter Survey Self-service Page

The header on each survey page now displays the Census Date value in bold.

Section B

The validation for Section B, Question 13 that disables the question if the response to Q12 is "No the qualification was not required" or "Don't know" is removed to allows values for both questions to be imported as part of the Import Survey Data process if the student has answered Q13.

Section C

The validation for Section C, Questions 19, 20 and 21 that disables the questions if the response to Q18 is "No" is removed to allow values for all the questions to be imported as part of the Import Survey Data process if the student has answered 19, 20 and 21.

Section E

New Unable to code (6) check boxes are added for each question in Section E for administrative users to allow the survey to be coded correctly where a student has selected more than one option on a paper questionnaire.

Section F

The display of Incomplete Questions in Section F is updated for Section B, Question 7 so that it is only displayed if the question has not been answered and "Working part-time" is selected for Question 1 and "Working full-time" is not selected as Most Important.

On clicking Submit in Section F, a warning message (message set 14720, message number 472) is displayed to administrative users if any questions are shown in Incomplete Questions.

A new Survey Method field is added to Section F for administrative users to allow the value to be updated prior to submitting a survey on behalf of a student.

If a student clicks Save and Return on any section, or Submit in Section F, the Survey Method is automatically updated to *04*.

Updates to Create Extract Data page

Access the Create Extract Data page (Records and Enrollment, HESA Reporting, Extract Processing, Create Extract).

Advanced search options are available by default for the prompt values of these fields: Return Name, Academic Plan, Academic Sub-plan and Course ID.

Updates to Course Extract Data and Instance Extract Data Pages

Access the Course Extract Data page (Records and Enrollment, HESA Reporting, Extract Data, Course Extract Data). The Course Extract Data page now displays all the records (previously it used to display the first 16 records).

Access the Instance Extract Data page (Records and Enrollment, HESA Reporting, Extract Data, Student Extract Data, Instance Extract Data). Financial Support and Mobility regions are added to the Instance Extract Data page. Also, on the same page RAE Data region is renamed Research Data.

Updates to Create XML Page

Access the Create XML page (Records and Enrollment, HESA Reporting, Extract Processing, Create XML).

The Create XML page is updated to include new/updated fields and entities. The RAEData element is updated to be included as <REFData>. The new MOBTYPE2 and MOBTYPE3 fields are included in the XML as <MOBTYPE>.

Field Derivation Changes

The changes are in blue.

Student Record Return: Course Entity

Course.OWNCOURSEID (New)

Field Definition		
Description:	**Own course identifier**	
Entity:	Course	
Return:	Student	
HESA DataType:	OWNCOURSEIDType	
Field Length:	50	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Plan	OWNCOURSEID	Plan HESA Data
Sub-Plan	OWNCOURSEID	Sub-Plan HESA Data
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
	1	If Course entity is based on a sub-plan, value from Sub-Plan HESA Data
	2	Value from Plan HESA Data
	3	Derive as null
Derivation Notes:	Optional for all courses	

Student Record Return: Course Subject Entity

CourseSubject.ITTSUBJECT

Field Definition		
Description:	**Subject of ITT Specialism Indicator**	
Entity:	CourseSubject	
Return:	Student	
HESA DataType:	ITTSUBJECTCodeType	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program	ITTSUBJECT	Program HESA Data – Course Subject
Plan	ITTSUBJECT	Plan HESA Data – Course Subject
Sub-Plan	ITTSUBJECT	Sub-Plan HESA Data – Course Subject
Derivation		
Dependent Fields	Course.TTCID	
Field Derivation Rule	If all the following conditions are met a value is derived: • Country = England • Course.TTCID = 1, 8, G, H, L, M, N or P Else field = null	

Derivation Steps:	1	If Course entity is based on a sub-plan, value from Sub-Plan HESA Data – Course Subject
	2	Value from Plan HESA Data – Course Subject
	3	Value from Program HESA Data – Course Subject
Derivation Notes:	A value is only required where at least one related Instance has ITTPHSC = 15, 16, 17, 18, 19, 24, 25, 26, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81 or 82, however, as this field is being derived prior to related Instances a value will be included based upon the TTCID value. Only one of the three CourseSubject entities needs to be flagged as the ITT specialism. Institutions will need to ensure that, if multiple CourseSubject records are defined, only one has an ITTSUBJECT value defined. S = ITT Programme Subject Specialism	

Student Record Return: Student Entity

Student.ETHNIC

Field Definition		
Description:	**Ethnicity**	
Entity:	Student	
Return:	Student	
HESA DataType:	ETHNICCodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Person	ETHNIC	Person HESA Data
Person	Regulatory Region, Ethnic Group	Person Information (Student) > Biographical (Student) > Personal Attributes > Ethnicity
Coding		
Code Mapping:	Ethnic Mapping	
Derivation		
Dependent Fields	EntryProfile.DOMICILE, Instance.REDUCEDI, Course.TTCID	
Field Derivation Rule	If all the following conditions are met a value is derived: • Student has at least one Instance with REDUCEDI = 00, 01, 07 or 08 and at least one of the following: • (a) Student has any EntryProfile in the extract with DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE or IM • (b) The student has any HESA Entry Profile record with DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE or IM. This would include consideration of all records for the student (based on EMPLID) irrespective of effective date or career/instance. • (c) The student has any Residency Self-Report record where the country = GBR or the mapped 2-char Country code is XF, XG, XH, XI, XK, XL, GG, JE or IM. This would include consideration of all non-future effective dated records for the student (based on EMPLID). • (d) Course.TTCID is 1, 8, G, H, L, M, N or P Else field = null	
Derivation Steps:	1	Value from Person HESA Data

	2	Select Person Ethnicity records as follows: • If a single record exists use that record. • If multiple records exist and one if flagged as Primary use that record. • If multiple records exists and none are flagged as primary, select the record with the highest Percentage defined under Ethnicity Detail. • If there is no way to distinguish between multiple records, select ~~the lowest alpha Ethnic Group code~~ the most recent record based on last updated date (LASTUPDDTTM from ETHNICITY_DTL) For the selected record map the Ethnic Group and Regulatory Region to a HESA code using Ethnic Mapping. If no mapping exists log an error message and skip to next step.
	3	Use default
	4	Derive as NULL ERROR

Student.TTPCODE

Field Definition		
Description:	**Term-time Postcode**	
Entity:	Student	
Return:	Student	
HESA DataType:	PostCodeWithNullStructure	
Field Length:	8	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Person	TTPCODE	Person HESA Data
Person	Postcode	Personal Information (Student) > Biographical (Student) > Addresses/Phones > Addresses
HESA Return	Address Types	Returns Setup > HESA Types
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.LOCSDY, Instance.REDUCEDI, Course.COURSEAIM	
Field Derivation Rule	If either of the conditions is met a value is derived: Either: • Country = England, Northern Ireland, Scotland • Student has at least one Instance with REDUCEDI = 00 or 07 where Instance.LOCSDY is null or does not equal 6, 9, D, ~~F,~~ S or T Or • Country = Wales • Student has at least one Instance with REDUCEDI = 00 or 07 where Instance.LOCSDY is null or does not equal 6, 9, D, ~~F,~~ S or T • Related COURSEAIM does not begin with P, Q, R, S or X. Else field = NULL	
Derivation Steps:	1	Value from Person HESA Data. *Formatting: If the value is more than 4 continuous characters, a space is added before the final 3 characters of the postcode.*

	2	Select the most recent active effective dated address record that falls on or before the end of the reporting period that has an Address Type that corresponds with those defined as the Address Types for TTPCODE in the HESA Return Setup record. If the country is one of the UK-related codes, the postcode is derived. If multiple valid addresses are found with the same effective date then one will be randomly picked. The following country codes are considered as UK-related for the purposes of this derivation: GBR (United Kingdom), XF (England), XG (Northern Ireland), XH (Scotland), XI (Wales), XK (UK not otherwise specified), XL (Channel Islands not otherwise specified), GG (Guernsey), GGY (Guernsey), JE (Jersey), JEY (Jersey), IM (Isle of Man), or IMN (Isle of Man)
	3	Use default
	4	Derive as null with ReasonForNull = '1'
Derivation Notes:	LOCSDY is only derived if REDUCEDI = 00 or 01 so will be null when REDUCEDI is 06 or 07 so need to also include when LOCSDY is null	

Student Record Return: Instance Entity

Instance.ADDSUPCT

Field Definition		
Description:	~~Additional~~ Learning **support cost**	
Entity:	Instance	
Return:	Student	
HESA DataType:	xs:positiveInteger	
Field Length:	6	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	ADDSUPCT	HESA Instance Data – Further Education tab
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.FESTUMK, Instance.FUNDMODEL	
Field Derivation Rule	Skip derivation if Include FE = 'N'. Field will not be included in the Instance extract data. If all the following conditions are met a value is derived: • Country = England, and • Instance.FESTUMK = 1, 3 or 4, and • Instance.REDUCEDI = 00 or 01, and • Instance.FUNDMODEL = 35 or 81 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	Use default
	4	Derive as NULL ERROR
Derivation Notes:	Default can be defined as zero.	

Instance.DHFUND

Field Definition		
Description:	**Department of Health Funding Body**	
Entity:	Instance	
Return:	Student	
HESA DataType:	DHFUNDCodeType	
Field Length:	3	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program	DHFUND	Program HESA Data (Program Instance HESA Data)
Plan	DHFUND	Plan HESA Data (Plan Instance HESA Data)
Sub-Plan	DHFUND	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Student Program/Plan	DHFUND	HESA Instance Data
Coding		
Code Mapping:		
Derivation		
Dependent Fields	Instance.REDUCEDI, Course.MSFUND	
Field Derivation Rule	If all the following conditions are met a value is derived: • Country = England • Instance.REDUCEDI = 00 or 01 • Related Course.MSFUND = ~~31~~ 37 or 38 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan HESA Data
	4	Value from Plan HESA Data
	5	Value from Program HESA Data
	6	Use default
	7	Derive as NULL ERROR

Instance.DHREGREF

Field Definition		
Description:	**Regulatory Body Reference Number**	
Entity:	Instance	
Return:	Student	
HESA DataType:	xs:string	
Field Length:	8	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Person	External System ID	Person Information (Student) > Identification (Student) > External System ID
Coding		
Code Mapping:	N/A	
Derivation		

Dependent Fields	Instance.REDUCEDI, Course.COURSEAIM, Course.REGBODY	
Field Derivation Rule	If all the following conditions are met a value is derived: • Instance.REDUCEDI = 00 or 01 • Related Course.REGBODY = 06 (NMC) or 07 (HCPC) or is in the range 40 to 55 inclusive • Related Course.COURSEAIM = M16, M26, M76, M86, H16, H62, H76, I16, I76, J26 or J76 Else field = null	
Derivation Steps:	1	Select External System ID records for the person with the External System ID Type defined for DHREGREF in the HESA Return Setup record. The most recent effective dated record with Effective Date on or before the reporting period end date should be used.
	2	Use default
	3	Derive as NULL ERROR
Derivation Notes:	Default can be set as '99999999'.	

Instance.ELQ (New)

Field Definition		
Description:	**Aiming for an Equivalent or Lower Qualification**	
Entity:	Instance	
Return:	Student	
HESA DataType:	ELQCodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	ELQ	HESA Instance Data
Derivation		
Dependent Fields	Instance.FEEELIG, Course.COURSEAIM, Instance.REDUCEDI	
Field Derivation Rule	Include for entities where: • Country = England, and • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1, and • Related Course.COURSEAIM begins E, M, H, I, J or C Else field = null	
Derivation Steps:	1	Value from HESA Instance Data
	2	Use default
	3	Derive as NULL ERROR
Derivation Notes:	Valid entries: 01 – Non-exempt ELQ 02 – Exempt ELQ 03 – Not ELQ 09 – Not required	

Instance.EMPROLE

Field Definition	
Description:	**Employer Role**

Entity:	Instance	
Return:	Student	
HESA DataType:	EMPROLECodeType	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	EMPROLE	HESA Instance Data – Further Education tab
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.FESTUMK	
Field Derivation Rule	Skip derivation if Include FE = 'N'. Field will not be included in the Instance extract data. If all the following conditions are met a value is derived: • Country = ~~England~~ Wales • Instance.FESTUMK = 1,3 or 4 • Instance.REDUCEDI = 00 or 01 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	Use default
	4	Derive as ~~NULL ERROR~~ null

Instance.FEEREGIME

Note: Step 4 for Northern Ireland was delivered in Bundle 31.

Field Definition		
Description:	**Fee regime indicator**	
Entity:	Instance	
Return:	Student	
HESA DataType:	FEEREGIMECodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	FEEREGIME	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.FEEELIG, Instance.SSN, EntryProfile.DOMICILE, Instance.EXCHANGE, Instance.MODE, Instance.MCDATE, Instance.REDUCEDI, Course.COURSEAIM, Course.TTCID	
Field Derivation Rule	If one of the following sets of conditions are met a value is derived, else the field is derived as null.	

	(a) England Postgraduate • Country = England, and • Related Course.COURSEAIM begins with E or M excluding M22 and M26, and • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 2, 4, 8, 9, A , and • (Instance.MODE = 01, 02, 23, 24, 25, 31, ~~52, 53,~~ 73, or 74) or (Instance.MODE = 43 or 44 and Instance.MCDATE is in the reporting period)
	(b) England Undergraduate • Country = England, and • Related Course.COURSEAIM begins with H, I, J, C or is M22 or M26, and • Related Course.TTCID is not F, and • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 2, 4, 8, 9, A , and • Instance.MODE = 01, 02, 23, 24, 25, 31, 43, 44, ~~52, 53,~~ 73, or 74
	(c) Northern Ireland Postgraduate • Country = Northern Ireland, and • Related Course.COURSEAIM is M71 or M88 • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 2, 4, 8, 9, A , and • Instance.SSN is null, and • (Instance.MODE = 01, 02, 23, 24, or 25~~, 52, or 53~~) or (Instance.MODE = 43 and Instance.MCDATE is in the reporting period)
	(d) Northern Ireland Undergraduate • Country = Northern Ireland, and • Related Course.COURSEAIM begins H, I, J, C or is M22 or M26 • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 2, 4, 8, 9, A , and • Instance.SSN is null, and • Instance.MODE = 01, 02, 23, 24, 25, or 43~~, 52, or 53~~
	(e) Scotland • Country = Scotland, and • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 2, 4, 8, 9, A , and • Instance.SSN is null, and • Instance.MODE = 01, 02, 23, 24, or 25~~, 52, or 53~~, and • Related Course.COURSEAIM is C20, C30, H00, H11, H16, H18, H22, H23, ~~H24~~, H50, I00, I11, I16, J20, J26, J30, M22, M26, M71 or M88

	(f) Wales • Country = Wales, and • Instance.REDUCEDI = 00, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 2, 4, 8, 9, A , and • Instance.SSN is null, and • Instance.MODE = 01, 02, 23, 24, 25, or 43~~, 52, or 53~~, and • Related Course.COURSEAIM begins H, I, J, C or is M22, M26, M71 or M88	
Derivation Steps:	1	Value from HESA Instance Data
	2	If COMDATE is before 01-~~AUG~~SEP-2012, derive as '10'
	3	If COMDATE is on or after 01-~~AUG~~SEP-2012 and Country = Scotland and either DOMICILE is Scotland (XH) or DOMICILE is European Union (excluding England, Northern Ireland and Wales), derive as '10' The DOMICILE value is derived in the same was as EntryProfile.DOMICILE and is derived even if an EntryProfile is not being included in the extract (i.e. for new and continuing students). The check on European Union includes countries where the EU Member State checkbox is selected in the Country Table plus also the generic 'EU' code (European Union not otherwise specified) and specifically excludes the individual country codes for England (XF), Northern Ireland (XG), Wales (XI) and UK not specified (XK).
	4	If COMDATE is on or after 01-~~AUG~~SEP-2012 and Country = Northern Ireland and either DOMICILE is Northern Ireland (XG) or DOMICILE is European Union (excluding England, Scotland and Wales), derive as 10. See Step 3 for details of deriving DOMICILE and EU country codes.
	5	If COMDATE is on or after 01-~~AUG~~SEP-2012, derive as '20'
Derivation Notes:	Valid values: 10 – Pre-Sept 2012 regime 20 – Post-Sept 2012 regime Instance.FEEELIG is only derived when REDUCEDI = 00, 01 or 09. Instance.MCDATE is only derived where Country = England, Northern Ireland, and Instance.REDUCEDI = 00 or 04, and the related Course.COURSEAIM begins with D, E, L or M (excluding M22 and M26), i.e. postgraduate. There are some EU-related territories that are currently not identified as EU member states and therefore not considered as EU for Step 3: Aland Islands (AX), French Guiana (GF) Guadeloupe (GP), Martinique (MQ), Reunion (RE), Gibraltar (GI), and Canary Islands (IS). MODE codes 52 and 53 are no longer used for 2013/14 onwards. COURSEAIM code H24 no longer used for 2013/14 onwards.	

Instance.FUNDADJOTH (New)

Field Definition	
Description:	**Other funding adjustment**
Entity:	Instance

Return:	Student	
HESA DataType:	FUNDADJOTHType	
Field Length:	3	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	FUNDADJOTH	HESA Instance Data
Derivation		
Dependent Fields	Instance.FESTUMK, Instance.REDUCEDI, Instance.FUNDMODEL	
Field Derivation Rule	Include for instances where: • Country = England, and • Instance.FESTUMK = 1, 3 or 4, and • Instance.REDUCEDI = 00 or 01, and • Instance.FUNDMODEL = 35 or 81 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	Use default
	4	Derive as NULL ERROR
Derivation Notes:	A 3-digit number in the range 0 to 999 should be returned.	

Instance.FUNDADJPRIOR (New)

Field Definition		
Description:	**Funding adjustment for prior learning**	
Entity:	Instance	
Return:	Student	
HESA DataType:	FUNDADJPRIORType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	FUNDADJPRIOR	HESA Instance Data
Derivation		
Dependent Fields	Instance.FESTUMK, Instance.REDUCEDI, Instance.FUNDMODEL, LearningDeliveryFAM.LEARNDELFAMTYPE	

Field Derivation Rule	Include for instances where:
	• Country = England, and
	• Instance.FESTUMK = 1, 3 or 4, and
	• Instance.REDUCEDI = 00 or 01, and
	• Either
	  ○ Instance.FUNDMODEL = 35 or 81,
	• Or
	  ○ Instance.FUNDMODEL = 99 and LearningDeliveryFAM.LEARNDELFAMTYPE = ADL
	Else field = null	

	1	Use constant
	2	Value from HESA Instance Data

	3	Use default
	4	Derive as NULL ERROR
Derivation Notes:	A 2-digit number in the range 0 to 99 should be returned.	

Instance.FUNDCODE

Field Definition		
Description:	**Fundability Code**	
Entity:	Instance	
Return:	Student	
HESA DataType:	FUNDCODECodeType	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program	FUNDCODE	Program HESA Data (Program Instance HESA Data)
Plan	FUNDCODE	Plan HESA Data (Plan Instance HESA Data)
Sub-Plan	FUNDCODE	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Student Program/Plan	FUNDCODE	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.FESTUMK	
Field Derivation Rule	If all the following conditions are met a value is derived: • Country is Northern, Ireland, Scotland or Wales, and • Instance.REDUCEDI = 00 or 01 Or • Country is England, and • Instance.REDUCEDI = 00 or 01, and • Instance.FESTUMK is not 1 or 4 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	4	Value from Plan Instance HESA Data
	5	Value from Program Instance HESA Data
	6	Use default
	7	Derive as NULL ERROR

Instance.FWORKCODE

Field Definition	
Description:	**Framework code**
Entity:	Instance
Return:	Student
HESA DataType:	xs:positiveInteger
Field Length:	3
Min Occurrences:	0
Max Occurrences:	1

Data Capture		
Level:	Field:	Page:
Returns Setup	Include FE	HESA Returns Setup
Student Program/Plan	FWORKCODE	HESA Instance Data
Coding		
Code Mapping:		
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.FESTUMK, Instance.PROGTYPE	
Field Derivation Rule	If Include FE = 'Y' and all the following conditions are met a value is derived: • Country = England • Instance.REDUCEDI = 00 or 01 • Instance.FESTUMK = 1, 3 or 4 • Instance.PROGTYPE ~~between 02 and 21 inclusive~~ is not null Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	Use default
	4	Derive as NULL ERROR

Instance.GROSSFEE

Field Definition		
Description:	**Gross fee**	
Entity:	Instance	
Return:	Student	
HESA DataType:	xs:nonNegativeInteger	
Field Length:	6	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Return	Account Type – Tuition	HESA Returns Setup
Student Career	Amount	Student Financials > Tuition and Fees > Review Fees After Calculation
Program	GROSSFEE	Program HESA Data (Program Instance HESA Data)
Program Offering	GROSSFEE	Program Offering HESA Data
Plan	GROSSFEE	Plan HESA Data (Plan Instance HESA Data)
Plan Offering	GROSSFEE	Plan Offering HESA Data
Sub-Plan	GROSSFEE	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Sub-Plan Offering	GROSSFEE	Sub-Plan Offering HESA Data
Student Program/Plan	GROSSFEE	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.FEEREGIME, ~~Instance.SSN~~	

Field Derivation Rule	If all the following conditions are met a value is derived: • Instance.FEEREGIME = 20 ~~and~~ ~~• Instance.SSN is null, and~~ Else, derived as null Note: FEEREGIME is derived depending on FEEELIG, EXCHANGE, MODE and COURSEAIM values, and for Scotland, Northern Ireland and Wales only if SSN is null.	
Derivation Steps:	1	Value from HESA Instance Data
	2	Total of all the tuition fee charges for the Student Career for terms that start within the reporting period. Fees records where the Item Type Code is 'Charge' and the Account Type is one of those defined with the Tuition checkbox selected in HESA Returns Setup. The derived value is rounded to the nearest pound.
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Offering HESA Data for the Academic Load of the student instance.
	4	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	5	Value from Plan Offering HESA Data for the Academic Load of the student instance.
	6	Value from Plan Instance HESA Data
	7	Value from Program Offering HESA Data for the Academic Load of the student instance.
	8	Value from Program Instance HESA Data
	9	Use default
	10	Derive as ~~NULL ERROR~~ null
Derivation Notes:	Note: FEEREGIME is only derived if • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE = 0, 7, B, C, D, E, Y, Z or null – see FEEREGIME for changes to EXCHANGE codes For Step 2: Fees records from PS_TUIT_CALC_TBL are matched for the Student Career being reported for the Instance with**:** • Academic Institution (INSTITUTION) = Academic Institution • EMPLID = EMPLID • Academic Career (ACAD_CAREER) = Academic Career • Student Career Nbr (STDNT_CAR_NBR) = Student Career Nbr • Term (STRM) = starts within reporting period The matching is updated to match on Institution and Career in the fees record rather than Business Unit and Billing Career as Business Unit may not equate to Institution. For GROSSFEE records are selected where ITEM_TYPE_CD = 'C' (Charge) and ACCOUNT_TYPE_SF is one of the types defined in HESA Returns Setup for Tuition (selected as ACCOUNT_TYPE_SF from PS_SSR_HE_RET_ACNT for the Institution and Return where SSR_HE_TUITION = 'Y').	

Instance.INTERCALATE (New)

Field Definition	
Description:	**Intercalation**
Entity:	Instance
Return:	Student
HESA DataType:	INTERCALATECodeType

Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program	INTERCALATE	Program HESA Data (Program Instance HESA Data)
Program Year	INTERCALATE	Program Offering Year HESA Data
Plan	INTERCALATE	Plan HESA Data (Plan Instance HESA Data)
Plan Year	INTERCALATE	Plan Offering Year HESA Data
Sub-Plan	INTERCALATE	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Sub-Plan Year	INTERCALATE	Sub-Plan Offering Year HESA Data
Student Program/Plan	INTERCALATE	HESA Instance Data
Derivation		
Dependent Fields	Instance.REDUCEDI	
Field Derivation Rule	If all the following conditions are met a value is derived: • Instance.REDUCEDI = 00, 01 or 03 Else, derived as null	
	1	Value from HESA Instance Data
	2	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	4	Value from Plan Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	5	Value from Plan Instance HESA Data
	6	Value from Program Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	7	Value from Program Instance HESA Data
	8	Use default
	9	Derive as null
Derivation Notes:	Valid entries: 01 – This student is studying on an intercalated course This flag must only be used for the year(s) that a student is intercalating.	

Instance.ITTPHSC

Field Definition		
Description:	**ITT Phase/Scope**	
Entity:	Instance	
Return:	Student	
HESA DataType:	ITTPHSCCodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program	ITTPHSC	Program HESA Data (Program Instance HESA Data)
Plan	ITTPHSC	Plan HESA Data (Plan Instance HESA Data)
Sub-Plan	ITTPHSC	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Student Program/Plan	ITTPHSC	HESA Instance Data
Coding		

Code Mapping:	N/A	
Derivation		
Dependent Fields	Course.REDUCEDC, Course.TTCID	
Field Derivation Rule	If all the following conditions are met a value is derived: • Country = England or Wales • Related Course.TTCID = 1, 2, 8, ~~E,~~ F, G, H, ~~J or K~~ L, M, N or P • Related Course.REDUCEDC = 00, 01, 04 or 07 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	4	Value from Plan Instance HESA Data
	5	Value from Program Instance HESA Data
	6	Use default
	7	Derive as Null Error
Derivation Notes:	Course.TTCID code E is now obsolete	

Instance.ITTSCHMS

Field Definition		
Description:	**ITT Schemes**	
Entity:	Instance	
Return:	Student	
HESA DataType:	ITTSCHMSCodeType	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program	ITTSCHMS	Program HESA Data (Program Instance HESA Data)
Plan	ITTSCHMS	Plan HESA Data (Plan Instance HESA Data)
Sub-Plan	ITTSCHMS	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Student Program/Plan	ITTSCHMS	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, Course.TTCID	
Field Derivation Rule	If all the following conditions are met a value is derived: • Country = England ~~or Wales~~ • Instance.REDUCEDI = 00, 01 or 04 • Related Course.TTCID = 1, 2, 8, G, H, ~~J or K,~~ L, M, N or P Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	4	Value from Plan Instance HESA Data
	5	Value from Program Instance HESA Data
	6	Use default

	7	Derive as NULL ERROR

Instance.NETFEE

Field Definition		
Description:	**Net fee**	
Entity:	Instance	
Return:	Student	
HESA DataType:	xs:nonNegativeInteger	
Field Length:	5	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Return	Account Type – Waiver	HESA Returns Setup
Student Career	Amount	Student Financials > Tuition and Fees > Review Fees After Calculation
Program	NETFEE	Program HESA Data (Program Instance HESA Data)
Program Offering	NETFEE	Program Offering HESA Data
Plan	NETFEE	Plan HESA Data (Plan Instance HESA Data)
Plan Offering	NETFEE	Plan Offering HESA Data
Sub-Plan	NETFEE	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Sub-Plan Offering	NETFEE	Sub-Plan Offering HESA Data
Student Program/Plan	NETFEE	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.FEEREGIME, Instance.SSN, Instance.GROSSFEE	
Field Derivation Rule	If all the following conditions are met a value is derived: • Instance.FEEREGIME = 20 ~~and~~ • ~~Instance.SSN is null, and~~ Else, derived as null	
Derivation Steps	1	Value from HESA Instance Data
	2	If GROSSFEE is derived from Step 2, NETFEE is derived as the rounded GROSSFEE minus the total of all waivers for the Student Career for terms that start within the reporting period. Fees records where the Item Type Code is 'Waiver' and the Account Type is one of those defined with the Waiver checkbox selected in HESA Returns Setup. The derived value is then rounded to the nearest pound.
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Offering HESA Data for the Academic Load of the student instance.
	4	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	5	Value from Plan Offering HESA Data for the Academic Load of the student instance.
	6	Value from Plan Instance HESA Data
	7	Value from Program Offering HESA Data for the Academic Load of the student instance.
	8	Value from Program Instance HESA Data
	9	Use default
	10	Derive as ~~NULL ERROR~~ null

Derivation Notes:	Note: FEEREGIME is only derived if • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE – 0, 7, B, C, D, E, Y, Z or null – see FEEREGIME for changes to EXCHANGE codes NETFEE can be derived from HESA Instance in Step 1 even if GROSSFEE is derived from a later step (e.g. from program, plan etc). For Step 2: NETFEE records are selected from PS_TUIT_CALC_TBL where ITEM_TYPE_CD = 'W' (Waiver) and ACCOUNT_TYPE_SF is one of the types defined in HESA Returns Setup for Waiver (selected as ACCOUNT_TYPE_SF from PS_SSR_HE_RET_ACNT for the Institution and Return where SSR_HE_WAIVER = 'Y'). See GROSSFEE for details of how tuition fee records are matched.

Instance.PARTNERUKPRN (New)

Field Definition		
Description:	**Subcontracted or partnership UKPRN**	
Entity:	Instance	
Return:	Student	
HESA DataType:	UKPRNType	
Field Length:	8	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	PARTNERUKPRN	HESA Instance Data – Further Education
Derivation		
Dependent Fields	Instance.FESTUMK, Instance.REDUCEDI, Instance.FUNDMODEL	
Field Derivation Rule	Include where: • Country = England, and • Instance.FESTUMK = 1, 3 or 4, and • Instance.REDUCEDI = 00 or 01 • Instance.FUNDMODEL = 25 or 82 Else, derived as null	
Derivation Steps	1	Value from Instance HESA Data
	2	Use default
	3	Derive as NULL ERROR
Derivation Notes:	A valid UKPRN as defined in the UK Register of Learning Providers (UKRLP) is 8 digits in the format 10000000 – 99999999	

Instance.PLANEEPHOURS (New)

Field Definition	
Description:	**Planned employability, enrichment and pastoral hours**
Entity:	Instance
Return:	Student
HESA DataType:	PLANHOURSType
Field Length:	4
Min Occurrences:	0

Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	PLANEEPHOURS	HESA Instance Data – Further Education
Derivation		
Dependent Fields	Instance.FESTUMK, Instance.REDUCEDI, Instance.FUNDMODEL	
Field Derivation Rule	Include where: • Country = England, and • Instance.FESTUMK = 1, 3 or 4, and • Instance.REDUCEDI = 00 or 01 • Instance.FUNDMODEL = 25 or 82 Else, derived as null	
Derivation Steps	1	Value from Instance HESA Data
	2	Use default
	3	Derive as NULL ERROR
Derivation Notes:	A value in the range 0 to 9999 hours (to the nearest whole hour) should be returned.	

Instance.PLANLEARNHOURS (New)

Field Definition		
Description:	**Planned learning hours**	
Entity:	Instance	
Return:	Student	
HESA DataType:	PLANHOURSType	
Field Length:	4	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	PLANLEARNHOURS	HESA Instance Data – Further Education
Derivation		
Dependent Fields	Instance.FESTUMK, Instance.REDUCEDI, Instance.FUNDMODEL, LearningDeliveryFAM.LEARNDELFAMTYPE	
Field Derivation Rule	Include where: • Country = England, and • Instance.FESTUMK = 1, 3 or 4, and • Instance.REDUCEDI = 00 or 01, and Either • Instance.FUNDMODEL = 10, 25, 81, 82 or 99 Or • Instance.FUNDMODEL = 35, and • Related LearningDeliveryFAM.LEARNDELFAMTYPE is not 'WPL' Else, derived as null	
Derivation Steps	1	Value from Instance HESA Data
	2	Use default
	3	Derive as NULL ERROR
Derivation Notes:	A value in the range 0 to 9999 hours (to the nearest whole hour) should be returned.	

Instance.PROGTYPE

Field Definition		
Description:	**Programme type**	
Entity:	Instance	
Return:	Student	
HESA DataType:	PROGTYPECodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Returns Setup	Include FE	HESA Returns Setup
Program	PROGTYPE	Program HESA Data (Program Instance HESA Data)
Plan	PROGTYPE	Plan HESA Data (Plan Instance HESA Data)
Sub-Plan	PROGTYPE	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Student Program/Plan	PROGTYPE	HESA Instance Data
Coding		
Code Mapping:		
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.FESTUMK, Instance.FUNDMODEL	
Field Derivation Rule	If Include FE = 'Y' and all the following conditions are met a value is derived: • Country = England • Instance.REDUCEDI = 00 or 01 • Instance.FESTUMK = 1, 3 or 4 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	4	Value from Plan Instance HESA Data
	5	Value from Program Instance HESA Data
	6	Use default
	7	If Instance.FUNDMODEL = ~~21, 22 or 45~~ 35, derive as NULL ERROR
	8	Derive as null

Instance.PWAYCODE

Field Definition		
Description:	**Apprenticeship pathway**	
Entity:	Instance	
Return:	Student	
HESA DataType:	xs:nonNegativeInteger	
Field Length:	3	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Returns Setup	Include FE	HESA Returns Setup

Program	PWAYCODE	Program HESA Data (Program Instance HESA Data)
Plan	PWAYCODE	Plan HESA Data (Plan Instance HESA Data)
Sub-Plan	PWAYCODE	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Student Program/Plan	PWAYCODE	HESA Instance Data
Coding		
Code Mapping:		
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.FESTUMK, Instance.PROGTYPE	
Field Derivation Rule	If Include FE = 'Y' and all the following conditions are met a value is derived: • Country = England • Instance.REDUCEDI = 00 or 01 • Instance.FESTUMK = 1, 3 or 4 • Instance.PROGTYPE = 02, 03, 10, 20, 21, 22 or 23 Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	4	Value from Plan Instance HESA Data
	5	Value from Program Instance HESA Data
	6	Use default
	7	Derive as NULL ERROR

Instance.REDUCEDI

Field Definition		
Description:	**Reduced Instance return indicator**	
Entity:	Instance	
Return:	Student	
HESA DataType:	REDUCEDICodeType	
Field Length:	2	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	REDUCEDI	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.EXCHANGE, Instance.MODE, Instance.STULOAD	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Country = England, Scotland or Northern Ireland and Instance.STULOAD is 10.0 or less, derive as '01' – Low Credit Bearing
	4	If Instance.EXCHANGE is 2, 4, 8, 9, A **or G**, derive as '03' – Exchange
	5	If Instance.MODE = 63 or 64, derive as '04' Note: This does not include 73 or 74 as the HESA guidance states that '04' is only permitted when MODE is 63 or 64.
	6	Derive as '00'

Derivation Notes:	Constant and default values are not used. Note: Some of the dependent fields themselves have a dependency on REDUCEDI. To allow REDUCEDI to be derived the dependent fields will need to first be derived for all instances and then filtered based on the subsequent REDUCEDI value. Valid values: 00 – Not a reduced return 01 – Low credit bearing 02 – Reduced FE - removed 2012/13 onwards 03 – Incoming visiting & exchange 04 – Dormant 06 – Student Associate Scheme (SAS) – removed 2011/12 onwards 07 – Subject Knowledge Enhancement (SKE) 08 – Instances present on the Student Loans Company (SLC) attendance confirmation date who do not progress beyond two weeks of their course – new from 2012/13 09 – Unistats only – new from 2012/13

Instance.SPECFEE

Field Definition		
Description:	**Special Fee Indicator**	
Entity:	Instance	
Return:	Student	
HESA DataType:	SPECFEECodeType	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program Year	SPECFEE	Program Offering Year HESA Data
Plan Year	SPECFEE	Plan Offering Year HESA Data
Sub-Plan Year	SPECFEE	Sub-Plan Offering Year HESA Data
Student Program/Plan	SPECFEE	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, Course.COURSEAIM	
Field Derivation Rule	If either of the conditions is met a value is derived: Either: • Country = ~~England,~~ Northern Ireland or Scotland, and • Instance.REDUCEDI = 00 Or • Country = England or Wales, and • Instance.REDUCEDI = 00, and • Course.COURSEAIM does not begin with P, Q, R, S or X Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.

	4	Value from Plan Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	5	Value from Program Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	6	Use default
	7	Derive as NULL ERROR
Derivation Notes:	Constant and default values can be defined as '0' (standard/prescribed fee) as appropriate.	

Instance.SSN

Note: The Field Derivation Rule change below was delivered in Bundle 31.

Field Definition		
Description:	**Student Support Number**	
Entity:	Instance	
Return:	Student	
HESA DataType:	SSNType	
Field Length:	13	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student	Student Support Number	View SLC Student Data – SSAR
Student Program/Plan	SSN	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Course.COURSEAIM	
Field Derivation Rule	If the following conditions are met a value is derived: • Related Course.COURSEAIM begins H, I, J, C, P, Q, R, S or X, or is M22, M26, M71 or M88, and • Related Course.COURSEAIM does not end 90 or 99 Else, derive as null	
Derivation Steps:	1	Value from HESA Instance Data
	2	Derive the SSN from the most recent ACR record (i.e. highest sequence number) for the EMPLID and Institution where the Aid Year (AID_YEAR) starts in the reporting period and where at least one row exists for the ACR with Attendance Indicator set to any value other than 'S' or 'X'.
	~~2~~ 3	Derive the SSN from the most recent SSAR record (i.e. highest sequence number) for the EMPLID and Institution where the Financial Aid Year starts in the reporting period if all the following are true: • A related First Attendance Confirmation record (SFA_SLC_ATD_CFR) exists~~, or at least one related ACR record exists with the Attendance Indicator set to any value other than S (suspended) or X (not in attendance)~~ • If the UCAS Course Code is defined in the SSAR, it can be mapped via a UCAS Course Mapping to the same Career and Program as the Instance. If the UCAS Course code is not defined in the SSAR, or there are no UCAS Course Mapping records for the UCAS Course Code, then the record is also assumed to be relevant to the Instance.
	~~3~~ 4	Derive as null

Derivation Notes:	Valid values: 13 characters, 4 alpha characters, 8 numeric characters, final alpha check character, e.g. WADM46891352A. Note: This does not currently consider whether MSTUFEE is reported as SLC full or part funded (02, 03, 04, 52, 53 or 54). Step 2: SSAR records (SFA_SLC_SSAR) are keyed on EMPLID, Institution, HEI Code (SFA_SLC_HEI_CD), Financial Aid Year (AID_YEAR) and Sequence (SFA_SLC_SEQ). The UCAS Course Code (SFA_SLC_UCAS_CRSCD) is used to map to Academic Career and Program via the UCAS Course mapping. As the UCAS Course Mapping includes Entry Year there will be multiple mappings for each UCAS Course Code, if the Career and Program for any of these mappings maps to the Instance then the record is considered relevant and included. Similarly if the UCAS Course Code is blank in the SSAR record; or a value is provided but no UCAS Course mappings exist then the SSAR is considered as being relevant to the Instance. A first Attendance Confirmation record is created (in SFA_SLC_ATD_CFR) when a SSAC file is generated with 'First Attendance Confirmation' selected. Records are keyed on EMPLID, Institution, HEI Code (SFA_SLC_HEI_CD), Aid Year (AID_YEAR) and Process Date/Time (SFA_SLC_PROC_DTTM). Records are mapped from SSAR records on EMPLID, Institution, HEI Code and Aid Year. The ACR records (SFA_SLC_ACR) are keyed on EMPLID, Institution, HEI Code (SFA_SLC_HEI_CD), Aid Year (AID_YEAR) and Sequence (SFA_SLC_SEQ). An Attendance Indicator (SFA_SLC_ATTEND_IND) value that it is not 'S' (suspended) or 'X' (not in attendance) indicates the student is in attendance. ACR records can be mapped from a SSAR record on EMPLID, Institution, HEI Code and Aid Year. New Step 2: This derivation also looks for an SSN from the ACR record when there is no SSAR record. This is because only students who apply for Maintenance Loans and Grants get SSAR records; and only students who apply for Tuition Loan and Grants get ACR records – so students will legitimately have one and not the other.
Business Rules	1 (Error) - Instance.SSN must not exist where (Course.COURSEAIM begins D, E, L, M (excluding M22, M26, M71, M88), P, Q, R, S or X) or where (Course.COURSEAIM ends with 90 or 99). 2 (Error) - Where the institution is in England, Northern Ireland or Wales, Instance.SSN must not exist where Instance.FEEELIG = 2 or 3. 3 (Error) – Instance.SSN must pass the checksum test given in the coding manual. 4 (Error) – Instance.SSN must exist where Instance.REDUCEDI = 08

Instance.TREFNO

Field Definition		
Description:	**Teacher Reference Number**	
Entity:	Instance	
Return:	Student	
HESA DataType:	xs:string	
Field Length:	9	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:

Person	External System ID	Person Information (Student) > Identification (Student) > External System ID
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, Course.TTCID, QualificationsAwarded.OUTCOME, QualificationsAwarded.QUAL	
Field Derivation Rule	If all the following conditions are met a value is derived: • Country = England, Scotland, Wales • Instance.REDUCEDI = 00 or 04 • Related Course.TTCID = 1, 8, G, H, ~~J or K,~~ L, M, N or P Else field = null	
Derivation Steps:	1	Select External System ID records for the person with the External System ID Type defined for TREFNO in the HESA Return Setup record. The most recent effective dated record with Effective Date on or before the reporting period end date should be used.
	2	Use default
	3	Derive as null
Derivation Notes:	Fields is derived without reference to QualificationsAwarded QUAL and OUTCOME values	
HESA Notes:	Compulsory for instances at institutions in England, Wales or Scotland where Course.TTCID = 1 or 8 and QualificationsAwarded.OUTCOME = 1 and QualificationsAwarded.QUAL = H11 or I11 and Instance.REDUCEDI = 00 or 04.	

Instance.WITHDRAWREASON

Field Definition		
Description:	**Withdrawal Reason**	
Entity:	Instance	
Return:	Student	
HESA DataType:	WITHDRAWNREASONCodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Returns Setup	Include FE	HESA Returns Setup
Student Program/Plan	WITHDRAWNREASON	HESA Instance Data
Coding		
Code Mapping:		
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.FESTUMK, Instance.CSTAT, ~~Instance.PROGTYPE, Instance.FUNDMODEL~~	

Field Derivation Rule	If Include FE = 'Y' and all the following conditions are met a value is derived: • Country = England • Instance.REDUCEDI = 00 or 01 • Instance.FESTUMK = 1, 3 or 4 • ~~Instance.PROGTYPE = 02, 03, 10, 20 or 21~~ • ~~Instance.FUNDMODEL is between 21 and 99 inclusive~~ • Instance.CSTAT = 3 (withdrawn) Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	Use default
	4	Derive as NULL ERROR

Instance.YEARLGTH

Field Definition		
Description:	**Length of current year of instance**	
Entity:	Instance	
Return:	Student	
HESA DataType:	PositiveIntegerWithNullStructure	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Program	YEARLGTH	Program HESA Data (Program Instance HESA Data)
Program Year	YEARLGTH	Program Offering Year HESA Data
Plan	YEARLGTH	Plan HESA Data (Plan Instance HESA Data)
Plan Year	YEARLGTH	Plan Offering Year HESA Data
Sub-Plan	YEARLGTH	Sub-Plan HESA Data (Sub-plan Instance HESA Data)
Sub-Plan Year	YEARLGTH	Sub-Plan Offering Year HESA Data
Student Program/Plan	YEARLGTH	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, Instance.LOCSDY, Course.COURSEAIM	
Field Derivation Rule	If either of the conditions is met a value is derived: Either • Country = Scotland • Instance.REDUCEDI = 00 Or • Country = Wales • Instance.REDUCEDI = 00 • Course.COURSEAIM does not begin with P, Q, R, S or X Else field = null	
Derivation Steps:	1	Use constant
	2	Value from HESA Instance Data
	3	If Instance.LOCSDY = D, F **or T**, derive as null with ReasonForNull = '9'

	4	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	5	If Instance.COURSEID is based on a sub-plan, value from Sub-Plan Instance HESA Data
	6	Value from Plan Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	7	Value from Plan Instance HESA Data
	8	Value from Program Offering Year HESA Data for the combination of Academic Load and YEARPRG of the student instance.
	9	Value from Program Instance HESA Data
	10	Use default
	11	Derive as NULL ERROR

Student Record Return: Entry Profile Entity

EntryProfile.CARELEAVER (New)

Field Definition		
Description:	**Care leaver / Looked after status**	
Entity:	Entry Profile	
Return:	Student	
HESA DataType:	CARELEAVERCodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	CARELEAVER	HESA Instance Data – Entry Profile
Derivation		
Dependent Fields	Instance.FUNDCODE, Instance.REDUCEDI, Instance.EXCHANGE, Course.COURSEAIM, Course.TTCID, EntryProfile.DOMICILE, EntryProfile.UCASAPPID	

Field Derivation Rule	Included where one of the following sets of conditions applies: • Country = England, and • Instance.REDUCEDI = 00, 01, 04 or 08, and • Course.COURSEAIM begins with H (except for H50, H60, H61, H62, H78 or H81), I (except I60, I61 or I81), J or C or is M22, M26, M71, or M88, and • Instance.FUNDCODE = 1 or 7 or null, and • Instance.COMDATE > 2013-07-31, and • Instance.EXCHANGE is not 4, G or Z, and • Course.TTCID is not F Or • Country = Scotland, and • Instance.REDUCEDI = 00 or 01, and • Course.COURSEAIM begins with H, I, J or C or is M22, M26 or M88, and • EntryProfile.DOMICILE = XF, XG, XH, XI or XK, and • Instance.COMDATE > 2013-07-31 Or • Country = Wales, and • Course.COURSEAIM beings with H, I, J or C or is M22, M26, M71 or M88, and • EntryProfile.UCASAPPID exists, and • Instance.COMDATE > 2013-07-31 Else field = null	
Derivation Steps	1	Use constant
	2	Value from HESA Instance Data – Entry Profile
	3	Use default
	4	Derive as NULL ERROR
Derivation Notes:	Valid entries: 01 Care leaver (16+) 02 Looked after in Scotland 03 In care in the rest of UK 04 UCAS defined care leaver 05 Not a care leaver 98 Information refused 99 Not known N.B. FUNDCODE is only derived when FESTUMK is not 1 or 4. Note: FUNDCODE is only derived when REDUCEDI = 00 or 01 and, for England, Instance.FESTUMK is not 1 or 4. To allow values to be derived when REDUCEDI = 04 or 08 the check in FUNDCODE includes null.	

EntryProfile.POSTCODE

Field Definition	
Description:	**Postcode**
Entity:	EntryProfile
Return:	Student
HESA DataType:	PostCodeWithNullStructure
Field Length:	8
Min Occurrences:	0

Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Person	Postcode	Personal Information (Student) > Biographical (Student) > Addresses/Phones > Addresses
Student Program/Plan	POSTCODE	Entry Profile HESA Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.REDUCEDI, EntryProfile.DOMICILE, Instance.COMDATE	
Field Derivation Rule	If all the following conditions are met a value is derived: • EntryProfile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE or IM • Related Instance.REDUCEDI = 00, 01, 04, ~~06~~ 07 or 08 Else field = null	
Derivation Steps:	1	Value from Entry Profile HESA Data *Formatting: If the value is more than 4 continuous characters, a space is added before the final 3 characters of the postcode.*
	2	Select the most recent active effective dated address record that falls prior to **Instance.COMDATE** and has an Address Type that corresponds with those defined as the Address Types for POSTCODE in the HESA Return Setup record. If multiple valid addresses are found with the same effective date then one will be randomly picked. If no addresses are found prior to COMDATE, then select the earliest effective dated record with an effective date on or after COMDATE (i.e. closest to COMDATE) that has an Address Type that corresponds with those defined as the Address Types for POSTCODE in the HESA Return Setup record. If multiple valid addresses are found with the same effective date then one will be randomly picked. If the country of the selected address is one of the UK-related codes, the postcode is derived. The following country codes are considered as UK-related for the purposes of this derivation: GBR (United Kingdom), XF (England), XG (Northern Ireland), XH (Scotland), XI (Wales), XK (UK not otherwise specified), XL (Channel Islands not otherwise specified), GG (Guernsey), GGY (Guernsey), JE (Jersey), JEY (Jersey), IM (Isle of Man), or IMN (Isle of Man)
	3	Derive as null field with ReasonForNull = '1'
Derivation Notes:	Constant and default values are not used. The valid formatting is enforced on the 'Edit Addresses' page when the country value selected is GBR.	

Student Record Return: Qualifications On Entry Entity

QualificationsOnEntry.QUALGRADE

Field Definition	
Description:	**Qualification Grade**
Entity:	QualificationsOnEntry
Return:	Student
HESA DataType:	QUALGRADECodeType
Field Length:	11

Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Grade	Entry Profile HESA Data – Entry Qualifications
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from Entry Profile HESA Data	
	2 Derive as ~~NULL ERROR~~ null	
Derivation Notes:	Grade is an optional value when defining Entry Qualification records in HESA Instance – Entry Profile.	

QualificationsOnEntry.QUALSIT

Field Definition		
Description:	**Qualification Sitting**	
Entity:	Qualifications on entry	
Return:	Student	
HESA DataType:	xs:string	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Sitting	Entry Profile HESA Data – Entry Qualifications
Derivation		
Dependent Fields:	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from Entry Profile HESA Data	
	2 Derive as ~~NULL ERROR~~ null	
Derivation Notes:	Sitting is an optional value when defining Entry Qualification records in HESA Instance – Entry Profile.	

Student Record Return: Qualifications Awarded Entity

QualificationsAwarded.CLASS

Field Definition		
Description:	Classification	
Entity:	Qualifications Awarded Entity	
Return:	Student	
HESA DataType:	CLASSCodeType	
Field Length:	2	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Classification	HESA Instance Data – Qualifications Awarded
Student Degree	Honors Code	Records and Enrollment > Graduation > Student Degrees > Degree Honors
Coding		

Code Mapping:	HESA Classification Mapping	
Derivation		
Dependent Fields	QualificationsAwarded.QUAL	
Field Derivation Rule	If either of the conditions are met a value is derived: • QualificationsAwarded.QUAL = M22, M26, H00, H11, H16, H18, H22, H23, ~~H24,~~ H50, I00, I11, I16, Or • Country = England or Wales • QualificationsAwarded.QUAL begins P, Q, R, S or X Else field = null	
Derivation Steps:	1	If the entity is derived from Instance HESA Date – Qualifications Awarded derive as the Classification value.
	2	If the entity is derived from Student Degrees, derive as the Honors Code mapped to a HESA classification using the HESA Classification Mapping where Honors Type = Degree Honors.
	3	Derive as NULL ERROR
Derivation Notes:	Constant and defaults not used.	

QualificationsAwarded.OUTCOME

Field Definition		
Description:	**Outcome of ITT Instance**	
Entity:	Qualifications Awarded	
Return:	Student	
HESA DataType:	OUTCOMECodeType	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	ITT Outcome	HESA Instance Data – Qualifications Awarded
Student Program/Plan	OUTCOME	HESA Instance Data
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Course.TTCID	
Field Derivation Rule	If all the following conditions are met a value is derived: • Country = England, Wales • Related Course.TTCID = 1, 8, G, H, ~~J or K,~~ L, M, N or P Else field = null	
Derivation Steps:	1	If the entity is derived from Instance HESA Date – Qualifications Awarded derive as the ITT Outcome value.
	2	If the entity is derived from Student Degrees, OUTCOME value defined in HESA Instance Data
	3	Use default
	4	Derive as NULL ERROR

Student Record Return: Learner Employment Status Entity

The coverage is updated for removal of FUNDMODEL codes 21, 22 and 45.

For each Instance entity, Learner Employment Status entities are created when:

- Country = England
- Instance.FESTUMK = 1, 3 or 4
- Instance.REDUCEDI = 00 or 01
- Instance.FUNDMODEL is between ~~22~~ 35 and 99 inclusive
- Include FE is 'Y' in HESA Returns Setup

Note: Entities are not created when FUNDMODEL is 10 ~~or 21,~~ or 25.

LearnerEmploymentStatus.EMPID

Field Definition	
Description:	**Employer identifier**
Entity:	LearnerEmploymentStatus
Return:	Student
HESA DataType:	EMPIDType
Field Length:	9
Min Occurrences:	0
Max Occurrences:	1

Data Capture		
Level:	Field:	Page:
Student Program/Plan	Employer ID	HESA Instance Data > Further Education > Employment Status
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	Instance.PROGTYPE, Instance.FUNDMODEL, LearningDeliveryFAM.LEARNDELFAMTYPE	
Field Derivation Rule	Included for all entities	
Derivation Steps:	1	Value from HESA Instance Data
	2	If one of the following is true NULL ERROR is derived • Instance.PROGTYPE = 02, 03, 10, 20, 21, 22, 23 Or • Instance.FUNDMODEL = ~~45~~ 70 or 81 Or • Instance.FUNDMODEL = 35, and LearningDeliveryFAM.LEARNDELFAMTYPE = WPL
	3	Derive as null
Derivation Notes:	Valid values: valid employer number from the Employer Data Service (EDS) Optional field in HESA Instance – Employment Status	

Student Record Return: REF Data Entity

The RAEData entity is renamed REFData.

The entity selection rule is updated to include REDUCEDI = 01:

Entities are created for each Instance entity where the student is undertaking a Research program and a full return is being made for the student. Selection is based upon the related Course record having a research COURSEAIM = L00, L80, L90, L99 or beginning with D and Instance.REDUCEDI = 00 or 01.

The entities are created based on the Student Advisor records for the student (Records and Enrollment > Student Background Information > Student Advisor) and the HESA Research data records defined for the associated advisors (Curriculum Management > Instructor/Advisor Information > Instructor/Advisor Table > Advisor HESA Data).

Note: The existing derivation of UOAPCNT is unchanged.

REFData.UOA2014 (New)

Field Definition	
Description:	**REF unit of assessment**
Entity:	REF Data
Return:	Student
HESA DataType:	UOA2014CodeType
Field Length:	3
Min Occurrences:	1

Max Occurrences:	1		
Data Capture			
Level:	Field:		Page:
Student Program/Plan	REF Unit Of Assessment		HESA Instance Data – Research Data
Instructor/Advisor	REF Unit Of Assessment		Advisor HESA Data
Derivation			
Dependent Fields	None		
Field Derivation Rule	Include for all entities		
Derivation Steps:	1	If the entity is derived from HESA Instance Data – Research Data derive as REF Unit Of Assessment	
	2	If the entity is derived from Student Advisor / Advisor HESA Data derive as REF Unit Of Assessment	
Derivation Notes:	Valid values are 2-digit codes (01 to 36) followed by letter A, B, C or Z. The final character is the letter denoting the multiple submission the member of staff was associated with or 'Z' where a multiple submission was not made.		

Student Record Return: Learning Delivery FAM Entity

LearningDeliveryFAM.LEARNDELFAMFROM (New)

Field Definition			
Description:	**Learning delivery funding and monitoring date applies from**		
Entity:	LearningDeliveryFAM		
Return:	Student		
HESA DataType:	DateWithNullStructure		
Field Length:	10		
Min Occurrences:	0		
Max Occurrences:	1		
Data Capture			
Level:	Field:		Page:
Student Program/Plan	Date From		HESA Instance Data > Further Education > Funding and Monitoring > Learning Delivery
Derivation			
Dependent Fields	LearningDeliveryFAM.LEARNDELFAMTYPE		
Field Derivation Rule	Include where • LearningDeliveryFAM.LEARNDELFAMTYPE = LSF or ALB Else derive as null		
Derivation Steps:	1	Value from HESA Instance Data converted to YYYY-MM-DD	
	2	Derive as NULL ERROR	
Derivation Notes:	Value is optional in definition of a Learning Delivery record.		

LearningDeliveryFAM.LEARNDELFAMTO (New)

Field Definition	
Description:	**Learning delivery funding and monitoring date applies to**
Entity:	LearningDeliveryFAM
Return:	Student
HESA DataType:	DateWithNullStructure

Field Length:	10	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Date To	HESA Instance Data > Further Education > Funding and Monitoring > Learning Delivery
Derivation		
Dependent Fields	LearningDeliveryFAM.LEARNDELFAMTYPE	
Field Derivation Rule	Include where • LearningDeliveryFAM.LEARNDELFAMTYPE = LSF or ALB Else derive as null	
Derivation Steps:	1	Value from HESA Instance Data converted to YYYY-MM-DD
	2	Derive as NULL ERROR
Derivation Notes:	Value is optional in definition of a Learning Delivery record.	

Student Record Return: Financial Support Entity (New)

This is a child entity of Instance for Financial Support. Up to four entities can be returned per Instance where Country = England.

This entity depends on the following instance fields for selecting data:

- Instance.FEEELIG
- Instance.FUNDCODE
- Course.COURSEAIM

Extract records (SSR_HE_FS_EXT, SSR_HE_FS_EX_FL) are only created if the 'Include Student entities' parameter has been selected.

- For each Instance (keyed on HUSID and NUMHUS) in the Instance Extract table for this run of the return (i.e. with status of ACTIVE)
    - If the following conditions are all met, Financial Support entities are created based on the records defined in HESA Instance Data
        - Country = England, and
        - Instance.REDUCEDI = 00, 01 or 04
        - Instance.FEEELIG = 1 or null and
        - Instance.FUNDCODE = 1 or 7 or null, and
        - Related Course.COURSEAIM begins with H (excluding H50, H60, H61, H62, H78 or H81), I (except I60, I61 or I81), J C or is M22, M26, M71, M88, and
        - Instance.EXCHANGE is not 4, G or Z
    - Else
        - No entity required, skip to next Instance

Note: For England FUNDCODE is only derived when REDUCEDI = 00 or 01 and Instance.FESTUMK is not 1 or 4. FEEELIG is only derived when REDUCEDI is 00, 01 or 09. The check on derived values also includes

null for these fields to allow Financial Support entities to be derived when REDUCEDI = 04 or when FESTUMK is 1 or 4.

FinancialSupport.FINAMOUNT (New)

Field Definition		
Description:	**Financial support amount**	
Entity:	FinancialSupport	
Return:	Student	
HESA DataType:	FINSUPPORTType	
Field Length:	6	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Amount	HESA Instance Data – Financial Support
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from HESA Instance Data	
Derivation Notes:	Values to be returned in pounds (£) A value is required to define a record in HESA Instance.	

FinancialSupport.FINTYPE (New)

Field Definition		
Description:	**Financial support type**	
Entity:	FinancialSupport	
Return:	Student	
HESA DataType:	FINTYPECodeType	
Field Length:	2	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Type	HESA Instance Data – Financial Support
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from HESA Instance Data	
Derivation Notes:	Valid values: 01 – Cash 02 – Near cash 03 – Accommodation discounts 04 – Other A value is required to define a record in HESA Instance.	

Student Record Return: Mobility Entity (New)

This is a child entity of Instance for Mobility. An unlimited number of Mobility entities can be returned per Instance.

Extract records (SSR_HE_MB_EXT, SSR_HE_MB_EX_FL) are only created if the 'Include Student entities' parameter has been selected.

Mobility extract records are only created if the 'Include Student entities' parameter has been selected.

- If 'Retain Data from Previous Run' is selected
    - Delete any existing extract records for the Return with status of INACTIVE
    - Update any existing extract records for the Return with status of ACTIVE, set status to INACTIVE
- If 'Retain Data from Previous Run' is not selected
    - Delete any existing extract records for the Return with any status

- For each Instance (keyed on HUSID and NUMHUS) in the Instance Extract table for this run of the return (i.e. with status of ACTIVE)
    - If Instance.**LOCSDY = T or U** and Instance.**REDUCEDI = 00 or 01**
        - Mobility entities are created based on the records defined for the most recent effective dated HESA Instance Data record where the effective date is not after the reporting period end date (i.e. not future)
        - Only records that cover some or all of this reporting period based on the Mobility Start and End are selected , where either
            a) The Start Date or the End Date falls within the reporting period, or
            b) The Start Date is before the reporting period start date and the End Date is after the reporting period end date

        - If either the Start Date or the End Date is outside of the reporting period (i.e. overlapping) only include the record if one of these conditions is met:
            - The duration in this reporting period is 25 days or more (i.e. 4 weeks or more)
            - The duration in this reporting period is less than 25 days and more than half of the total number of days are in this reporting period
                - *i.e. this is the major part of the duration, the minor part is in the next or previous period and will be added to this*
                - *If the major part is in the next or previous reporting period and the duration of this minor part is less than 24 days then the record is not included as those days will be added to the major part*
            - The duration in this reporting period is less than 25 days and exactly half of the days are in this reporting period **and** the start date is in this reporting period
                - *i.e. for an exact split between periods where both parts are less than 25 days, the record is included in the first period only and all the days reported there*
    - Else

- No entity required, skip to next Instance

Mobility.MOBDURA (New)

Field Definition		
Description:	**Mobility duration**	
Entity:	Mobility	
Return:	Student	
HESA DataType:	MOBDURAType	
Field Length:	2	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Start Date	HESA Instance Data – Mobility
Student Program/Plan	End Date	HESA Instance Data – Mobility
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	If the Start and End Date both fall within the reporting period (i.e. not overlapping), derived as the total number of days converted to weeks. Days are converted to weeks by dividing by 7 and rounding to the nearest week, 4 days is rounded up, 3 days is rounded down.
	2	For overlapping records the total number of days is calculated as: • Number of days that fall in this reporting period ○ i.e. days from the Start Date or reporting period start (whichever is the later) until the End Date or reporting period end (whichever is the earlier) • If the Start Date is before the reporting period and the number of days in the preceding period is between 1 and 24 inclusive those days are added to the total • If the End Date is after the reporting period and the total number of days in the following period is between 1 and 24 inclusive those days are added to the total Derived as total number of days converted to weeks
Derivation Notes:	As part of the entity selection a Mobility records is only included if it is either (a) contained within the reporting period, or (b) has 25 days (i.e. 4 weeks) or more in this period, or (c) has less that 25 days in this period but is the majority part of an overlapping record, or (d) has less than 25 days in this period but is the first part of an overlapping record that is equally split across two reporting periods.	

Mobility.MOBLOCA (New)

Field Definition	
Description:	**Mobility location**
Entity:	Mobility

Return:	Student	
HESA DataType:	MOBLOCACodeType	
Field Length:	2	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Location	HESA Instance Data – Mobility
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from HESA Instance Data - Mobility	
Derivation Notes:	Valid values are 2-character country codes. A value is required to define a Mobility record in HESA Instance.	

Mobility.MOBSCHEME (New)

Field Definition		
Description:	**Mobility scheme**	
Entity:	Mobility	
Return:	Student	
HESA DataType:	MOBSCHEMECodeType	
Field Length:	2	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Scheme	HESA Instance Data – Mobility
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from HESA Instance Data - Mobility	
Derivation Notes:	Valid values are: 01 – Institutional 02 – Sandwich placement that meets the criteria set out by funding councils 03 – ERASMUS 04 – Other I scheme A value is required to define a Mobility record in HESA Instance.	

Mobility.MOBTYPE (New)

Field Definition	
Description:	**Mobility type**
Entity:	Mobility
Return:	Student
HESA DataType:	MOBTYPECodeType
Field Length:	2
Min Occurrences:	1
Max Occurrences:	3
Data Capture	

Level:	Field:	Page:
Student Program/Plan	Type 1	HESA Instance Data – Mobility
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from HESA Instance Data - Mobility	
Derivation Notes:	Valid values are: 01 – Study abroad 02 – Work abroad 03 – Volunteering A value is required to define a Mobility record in HESA Instance.	

Mobility.MOBTYPE2, MOBTYPE3 (New)

Field Definition		
Description:	**Mobility type**	
Entity:	Mobility	
Return:	Student	
HESA DataType:	MOBTYPECodeType	
Field Length:	2	
Min Occurrences:	1	
Max Occurrences:	3	
Data Capture		
Level:	Field:	Page:
Student Program/Plan	Type 2	HESA Instance Data – Mobility
Student Program/Plan	Type 3	HESA Instance Data – Mobility
Coding		
Code Mapping:	N/A	
Derivation		
Dependent Fields	None	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1 Value from HESA Instance Data - Mobility	
	2 Derive as null	
Derivation Notes:	Values are optional to define a Mobility record in HESA Instance	

KIS Return: Location Entity

Location.SUURL (New)

Field Definition		
Description:	**Student union URL**	
Entity:	Location	
Return:	KIS	
HESA DataType:	URLType	
Field Length:	255	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture	Field:	Page:
Institution	Student Union URL	Institution HESA Data – Location
Derivation		
Dependent Fields	None	

Field Derivation Rule	Include for all entities	
Derivation Steps:	1	Value from the Location in Institution HESA Data
	2	Derived as null
Notes:	To be used where the location has a different student union. This field is also included in the Institution entity.	

KIS Return: KISCourse Entity

KISCourse.LOCCHNGE

Field Definition		
Description:	**Change of course location**	
Entity:	KISCourse	
Return:	KIS	
HESA DataType:	LOCCHNGECodeType	
Field Length:	1	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture	Field:	Page:
Sub-Plan	LOCCHNGE	Sub-Plan HESA Data – KIS Course Data
Plan	LOCCHNGE	Plan HESA Data – KIS Course Data
Program	LOCCHNGE	Program HESA Data – KIS Course Data
Derivation		
Dependent Fields	KISCourse.KISTYPE	
Field Derivation Rule	If all the following conditions are met a value is derived: • KISCourse.KISTYPE = 1 or 2 • KISCourse.DISTANCE = 0 Else field = null	
Derivation Steps:	1	Use constant
	2	If KIS Course entity is based on a sub-plan, value from Sub-Plan HESA Data
	3	Value from Plan HESA Data
	4	Value from Program HESA Data
	5	Use default
	6	Derived as NULL ERROR
Notes:	Coverage: Where KISCourse.KISTYPE = 1 or 2 Codes provided in C13061CodeLists.xsd: 0 – The course does not change location 1 – The course does change location	
Business Rules:	1 (Error) – must exist where KISTYPE = 1 or 2 2 (Error) – must not exist where KISTYPE = 3 3 (Error) – must not exist where DISTANCE = 1	

KISCourse.TEACHUKPRN

Field Definition	
Description:	**Teaching institution UK Provider Reference Number**
Entity:	KISCourse
Return:	KIS
HESA DataType:	UKPRNType
Field Length:	8
Min Occurrences:	0

Max Occurrences:	**50**	
Data Capture	Field:	Page:
Sub-Plan	TEACHUKPRN	Sub-Plan HESA Data – KIS Course Data
Plan	TEACHUKPRN	Plan HESA Data – KIS Course Data
Program	TEACHUKPRN	Program HESA Data – KIS Course Data
Derivation		
Dependent Fields	HESACourse, ILRAims	
Field Derivation Rule	If all the following conditions are met a value is derived: • HESACourse does not exist • ILRAims does not exist Else field = null	
Derivation Steps:	1	Use constant
	2	If KIS Course entity is based on a sub-plan, value from Sub-Plan HESA Data
	3	Value from Plan HESA Data
	4	Value from Program HESA Data
	5	Use default
	6	Derived as ~~NULL ERROR~~ null
Notes:	Coverage: Where no HESACourse or ILRAims exist.	
Business Rules:	1 (Warning) - Where KISTYPE = 1 and (HESACourse entity or ILRAims entity) exist TEACHUKPRN should not exist. 2 (Error) - Where KISTYPE = 3 then TEACHUKPRN must not exist more than once. 3 (Error) – Where TEACHUKPRN equals Institution.UKPRN and no (HESACourse or ILRAims entities) exist then TEACHUKPRN must exist more than once. 4 (Error) - must be unique within the KISCourse entity. 5 (Error) - must be a valid UKPRN.	

KISCourse.UCASCOURSEID

Field Definition		
Description:	**UCAS course code for the course**	
Entity:	KISCourse	
Return:	KIS	
HESA DataType:	UCASCOURSEIDType	
Field Length:	4	
Min Occurrences:	0	
Max Occurrences:	1	
Data Capture	Field:	Page:
Sub-Plan	UCASCOURSEID	Sub-Plan HESA Data – KIS Course Data
Plan	UCASCOURSEID	Plan HESA Data – KIS Course Data
Coding		
Code Mapping:	UCAS Course mapping (Setup SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > UCAS Course)	
Derivation		
Dependent Fields	KISCourse.KISTYPE	
Field Derivation Rule	If all the following conditions are met a value is derived: • KISCourse.KISTYPE = 1 or 2 Else field = null	
Derivation Steps:	1	If Course entity is based on a sub-plan, UCASCOURSEID value from Sub-Plan HESA Data
	2	If Course entity is based on a sub-plan, map the combination of Sub-Plan and Plan to a UCAS course code via the UCAS mappings – see below
	3	UCASCOURSEID value from Plan HESA Data

	4	Map the Plan code to a UCAS course code via the UCAS mappings – see below
	5	Derive as null
Notes:	Coverage: where KISCourse.KISTYPE = 1,2 and the courses recruit through UCAS and separate KIS to be produced. This field should contain the UCAS Course code for 2014 for the 2013/14 return. This field must contain a valid UCAS Course code. UCASCOURSEID for a KISCourse.KISCOURSEID must be provided. There is a one-to-one relationship between UCASCOURSEID and KISCourse.KISCOURSEID. UCAS Course mappings: the UCAS course code (SAD_UC_COURSE) is selected from the most recent record (by entry year and entry month) in SAD_UC_COURSE where the sub-plan (for step 2) or the plan (for step 4) is defined for the UCAS Course. Step 2 - For Sub-Plans, select records from SAD_UC_COURSE where the Academic Institution matches the institution of the KIS return, the Academic Sub-Plan matches the KISCOURSEID and the Active flag is 'Y'. If multiple records are found the record with the highest entry year (SAD_UC_ENTRYYEAR) is selected. If multiple records for the same Entry Year are found, the record with the highest Entry Month is selected. If multiple records for the same Entry Year and Entry Month are found (i.e. more than one UCAS Course Code is found), NULL ERROR is derived. Step 4 - For Plans, select records from SAD_UC_COURSE where the Academic Institution matches the institution of the KIS return, the Academic Plan matches the KISCOURSEID, the Sub-Plan is blank and the Active flag is 'Y'. If multiple records are found the record with the highest entry year (SAD_UC_ENTRYYEAR) is selected. If multiple records for the same Entry Year are found, the record with the highest Entry Month is selected. If multiple records for the same Entry Year and Entry Month are found (i.e. more than one UCAS Course Code is found), NULL ERROR is derived.	
Business Rules:	1 (Error) – KISTYPE 3 courses that are not Combined studies (KISCourse.JACSL2=41) cannot contain a UCASCOURSEID 2 (Warning) – should exist for those institutions supplying UCAS course data where KISTYPE = 1 or 2 and KISMODE = 1 or 3.	

KIS Return: CourseStage Entity

CourseStage.COURSEWORK

Field Definition		
Description:	**Coursework assessment percentage**	
Entity:	CourseStage	
Return:	KIS	
HESA DataType:	IntPrcntType	
Field Length:	3	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture	Field:	Page:
Program level	Coursework	Program HESA Data – Course Stage
Program level	Coursework	Program HESA Data – Stage Modules
Plan level	Coursework	Plan HESA Data – Course Stage
Plan level	Coursework	Plan HESA Data – Stage Modules
Sub-plan level	Coursework	Sub-Plan HESA Data – Course Stage
Sub-plan level	Coursework	Sub-Plan HESA Data – Stage Modules
Derivation		

Dependent Fields	CourseStage.STAGE, CourseStage.PRACTICAL, CourseStage.WRITTEN	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	If STAGE is derived from Sub-Plan and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	2	If STAGE is derived from Sub-Plan, and at least one Stage Module record is defined for the sub-plan stage, derive as the average value for each of the modules weighted by FTE.
	~~2~~ 3	If STAGE is derived from Plan and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	4	If STAGE is derived from Plan and at least one Module record is defined for the plan stage, derive as the average value for each of the modules weighted by FTE.
	~~3~~ 5	If STAGE is derived from Program and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	6	If STAGE is derived from Program and at least one Module record is defined for the program stage, derive as the average value for each of the modules weighted by FTE.
Notes:	This field records the percentage of the assessment for the stage that is through coursework. This field can contain a value in the range 0 - 100. The sum of this field, CourseStage.WRITTEN and CourseStage.PRACTICAL must equal 0 (in the case where there is no summative assessment in the year) or 100. Zero values are derived. For steps 2, 4 and 6 after all three assessment fields (COURSEWORK, PRACTICAL and WRITTEN) have been derived, if the total of all three fields does not equal 100 or zero the derived value of the field with the largest value is adjusted to ensure that the total equals 100. The largest value is adjusted to ensure that a zero value is not adjusted to -1.	

CourseStage.PRACTICAL

Field Definition		
Description:	**Practical exam assessment percentage**	
Entity:	CourseStage	
Return:	KIS	
HESA DataType:	IntPrcntType	
Field Length:	3	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture	Field:	Page:
Program level	Practical Exam	Program HESA Data – Course Stage
Program level	Practical Exam	Program HESA Data – Stage Modules
Plan level	Practical Exam	Plan HESA Data – Course Stage
Plan level	Practical Exam	Plan HESA Data – Stage Modules
Sub-plan level	Practical Exam	Sub-Plan HESA Data – Course Stage
Sub-plan level	Practical Exam	Sub-Plan HESA Data – Stage Modules
Derivation		
Dependent Fields	CourseStage.STAGE, CourseStage.COURSEWORK, CourseStage.WRITTEN	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	If STAGE is derived from Sub-Plan and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.

	2	If STAGE is derived from Sub-Plan, and at least one Stage Module record is defined for the sub-plan stage, derive as the average value for each of the modules weighted by FTE.
	~~2~~ 3	If STAGE is derived from Plan and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	4	If STAGE is derived from Plan and at least one Module record is defined for the plan stage, derive as the average value for each of the modules weighted by FTE.
	~~3~~ 5	If STAGE is derived from Program and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	6	If STAGE is derived from Program and at least one Module record is defined for the program stage, derive as the average value for each of the modules weighted by FTE.
Notes:	This field should contain the percentage of the assessment for the CourseStage that is through practical exams. This field can contain a value in the range 0 - 100. The sum of this field, CourseStage.COURSEWORK and CourseStage.WRITTEN must equal 0 (in the case where there is no summative assessment in the year) or 100. For steps 2, 4 and 6 after all three assessment fields (COURSEWORK, PRACTICAL and WRITTEN) have been derived, if the total of all three fields does not equal 100 or zero the derived value of the field with the largest value is adjusted to ensure that the total equals 100. The largest value is adjusted to ensure that a zero value is not adjusted to -1.	

CourseStage.WRITTEN

Field Definition		
Description:	**Written exam assessment percentage**	
Entity:	CourseStage	
Return:	KIS	
HESA DataType:	IntPrcntType	
Field Length:	3	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture	Field:	Page:
Program level	Written Exam	Program HESA Data – Course Stage
Program level	Written Exam	Program HESA Data – Stage Modules
Plan level	Written Exam	Plan HESA Data – Course Stage
Plan level	Written Exam	Plan HESA Data – Stage Modules
Sub-plan level	Written Exam	Sub-Plan HESA Data – Course Stage
Sub-plan level	Written Exam	Sub-Plan HESA Data – Stage Modules
Derivation		
Dependent Fields	CourseStage.STAGE, CourseStage.COURSEWORK, CourseStage.PRACTICAL	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	If STAGE is derived from Sub-Plan and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	2	If STAGE is derived from Sub-Plan, and at least one Stage Module record is defined for the sub-plan stage, derive as the average value for each of the modules weighted by FTE.
	~~2~~ 3	If STAGE is derived from Plan and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.

	4	If STAGE is derived from Plan and at least one Module record is defined for the plan stage, derive as the average value for each of the modules weighted by FTE.
	~~3~~ 5	If STAGE is derived from Program and either (a) the total of the three Assessment fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	6	If STAGE is derived from Program and at least one Module record is defined for the program stage, derive as the average value for each of the modules weighted by FTE.
Notes:	This field should contain the percentage of the assessment for the stage that is through written exams. This field can contain a value in the range 0 - 100. The sum of this field, CourseStage.COURSEWORK and CourseStage.PRACTICAL must equal 0 (in the case where there is no summative assessment in the year) or 100. For steps 2, 4 and 6 after all three assessment fields (COURSEWORK, PRACTICAL and WRITTEN) have been derived, if the total of all three fields does not equal 100 or zero the derived value of the field with the largest value is adjusted to ensure that the total equals 100. The largest value is adjusted to ensure that a zero value is not adjusted to -1.	

CourseStage.INDEPENDENT

Field Definition		
Description:	**Independent study percentage**	
Entity:	CourseStage	
Return:	KIS	
HESA DataType:	IntPrcntType	
Field Length:	3	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture	Field:	Page:
Program level	Independent Study	Program HESA Data – Course Stage
Program level	Independent Study	Program HESA Data – Stage Modules
Plan level	Independent Study	Plan HESA Data – Course Stage
Plan level	Independent Study	Plan HESA Data – Stage Modules
Sub-plan level	Independent Study	Sub-Plan HESA Data – Course Stage
Sub-plan level	Independent Study	Sub-Plan HESA Data – Stage Modules
Derivation		
Dependent Fields	CourseStage.STAGE, CourseStage.SCHEDULED, CourseStage.PLACEMENT	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	If STAGE is derived from Sub-Plan and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	2	If STAGE is derived from Sub-Plan and at least one Stage Module record is defined for the sub-plan stage, derive as the average value for each of the modules weighted by FTE.
	~~2~~ 3	If STAGE is derived from Plan and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	4	If STAGE is derived from Plan and at least one Module record is defined for the plan stage, derive as the average value for each of the modules weighted by FTE.
	~~3~~ 5	If STAGE is derived from Program and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.

	6	If STAGE is derived from Program and at least one Module record is defined for the program stage, derive as the average value for each of the modules weighted by FTE.
Notes:	This field should contain the percentage of the student's time for the stage that is spent in guided independent study. This field can contain a value in the range 0 - 100. The sum of this field, CourseStage.SCHEDULED and CourseStage.PLACEMENT must equal 100. For steps 2, 4 and 6 after all three Learning Method fields (SCHEDULED, INDEPENDENT and PLACEMENT) have been derived, if the total of all three fields does not equal 100 or zero the derived value of the field with the largest value is adjusted to ensure that the total equals 100. The largest value is adjusted to ensure that a zero value is not adjusted to -1.	

CourseStage.PLACEMENT

Field Definition		
Description:	**Placement study percentage**	
Entity:	CourseStage	
Return:	KIS	
HESA DataType:	IntPrcntType	
Field Length:	3	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture	Field:	Page:
Program level	Placement Study	Program HESA Data – Course Stage
Program level	Placement Study	Program HESA Data – Stage Modules
Plan level	Placement Study	Plan HESA Data – Course Stage
Plan level	Placement Study	Plan HESA Data – Stage Modules
Sub-plan level	Placement Study	Sub-Plan HESA Data – Course Stage
Sub-plan level	Placement Study	Sub-Plan HESA Data – Stage Modules
Derivation		
Dependent Fields	CourseStage.STAGE, CourseStage.SCHEDULED, CourseStage.INDEPENDENT	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	If STAGE is derived from Sub-Plan and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	2	If STAGE is derived from Sub-Plan and at least one Stage Module record is defined for the sub-plan stage, derive as the average value for each of the modules weighted by FTE.
	~~2~~ 3	If STAGE is derived from Plan and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	4	If STAGE is derived from Plan and at least one Module record is defined for the plan stage, derive as the average value for each of the modules weighted by FTE.
	~~3~~ 5	If STAGE is derived from Program and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	6	If STAGE is derived from Program and at least one Module record is defined for the program stage, derive as the average value for each of the modules weighted by FTE.

Notes:	This field should contain the percentage of the student's time for the CourseStage that is spent on placements or in work experience. This would also include language and other years abroad. This field can contain a value in the range 0 - 100. The sum of this field, CourseStage.INDEPENDENT and CourseStage.SCHEDULED must equal 100. For steps 2, 4 and 6 after all three Learning Method fields (SCHEDULED, INDEPENDENT and PLACEMENT) have been derived, if the total of all three fields does not equal 100 or zero the derived value of the field with the largest value is adjusted to ensure that the total equals 100. The largest value is adjusted to ensure that a zero value is not adjusted to -1.

CourseStage.SCHEDULED

Field Definition		
Description:	**Scheduled learning and teaching study percentage**	
Entity:	CourseStage	
Return:	KIS	
HESA DataType:	IntPrcntType	
Field Length:	3	
Min Occurrences:	1	
Max Occurrences:	1	
Data Capture	Field:	Page:
Program level	Scheduled Study	Program HESA Data – Course Stage
Program level	Scheduled Study	Program HESA Data – Stage Modules
Plan level	Scheduled Study	Plan HESA Data – Course Stage
Plan level	Scheduled Study	Plan HESA Data – Stage Modules
Sub-plan level	Scheduled Study	Sub-Plan HESA Data – Course Stage
Sub-plan level	Scheduled Study	Sub-Plan HESA Data – Stage Modules
Derivation		
Dependent Fields	CourseStage.STAGE, CourseStage.PLACEMENT, CourseStage.INDEPENDENT	
Field Derivation Rule	Include for all entities	
Derivation Steps:	1	If STAGE is derived from Sub-Plan and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	2	If STAGE is derived from Sub-Plan and at least one Stage Module record is defined for the sub-plan stage, derive as the average value for each of the modules weighted by FTE.
	~~2~~ 3	If STAGE is derived from Plan and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	4	If STAGE is derived from Plan and at least one Module record is defined for the plan stage, derive as the average value for each of the modules weighted by FTE.
	~~3~~ 5	If STAGE is derived from Program and either (a) the total of the three Learning Method fields is 100 or (b) no Stage Modules are defined, derived from the same Course Stage record.
	6	If STAGE is derived from Program and at least one Module record is defined for the program stage, derive as the average value for each of the modules weighted by FTE.

Notes:	This field should contain the percentage of the student's time for the CourseStage that is spent in scheduled learning and teaching activities. This field can contain a value in the range 0 - 100. The sum of this field, CourseStage.INDEPENDENT and CourseStage.PLACEMENT must equal 100. For steps 2, 4 and 6 after all three Learning Method fields (SCHEDULED, INDEPENDENT and PLACEMENT) have been derived, if the total of all three fields does not equal 100 or zero the derived value of the field with the largest value is adjusted to ensure that the total equals 100. The largest value is adjusted to ensure that a zero value is not adjusted to -1.