(GBR) HESA Field Derivation

Understanding HESA Derivation Steps

Bundle 52. This chapter is updated for:

- HESA Student Return 2018/19
- Data Futures return. The existing compare processing for Course and Course Subject is removed along with the corresponding master records.

Academic institutions submit the student-based statistical returns to HESA as an XML file. The XML file is composed of entities. Each entity, in turn, is composed of data fields. For example, the Institution entity in the student return has three data fields: INSTAPP, RECID, and UKPRN. The specifications for HESA returns are available from the HESA website. The specifications on the HESA website also include field validations and the valid field values for the various returns.

See also Understanding HESA Returns

This documentation discusses the:

- Campus Solution pages that the Create Extract Application Engine (SSR_HE_DATA) process uses to derive each field.
- Steps that the Create Extract process performs to derive each field.

This documentation does not list the Constant and Default fields on the HESA Fields page that the Create Extract process uses for derivation. However, it does note the step where the Create Extract process uses a constant and default value for derivation. For information about the HESA Fields page, see Setting Up a HESA Return

The Create Extract process performs a sequence of steps to derive a field. If the process finds a value in a certain step, it does not perform the next step. For example, the process performs the following steps to derive the Course.BITTM field value:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

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If a constant value exists for Course.BITTM, then the process uses the constant value in the return and does not perform Step 2 and the remaining steps. If a constant value does not exist, the process performs the next step in the sequence, which Step 2. If the process is not able to derive the value after performing Steps 1 through 5, it performs the last step and sets the Course.BITTM value to *NULL ERROR* in the HESA return.

The last derivation step for most fields is to either assign the value as *NULL ERROR* or not to derive a value and leave the field as blank. If HESA requires a value for a field, the last derivation step is to assign the field a value of *NULL ERROR.* Conversely, if HESA does not require a value for a field, the last derivation step is to not derive a value and leave the field value as blank. For example, if the Create Extract process cannot derive a Course.FEQAIMC value, it leaves the Course.FEQAIMC value as blank because HESA does not require a value for Course.FEQAIMC for a Course entity.

In some cases, before executing the derivation steps, the Create Extract process checks the Field Derivation Rule to determine whether a value should be derived. If a value should not be derived, the process leaves the field value as blank. For example, before performing the derivation steps for Course.BITTM, the process first checks whether:

- Country = Wales, Scotland, or Northern Ireland
- Course.REDUCEDC = 00, 01, or 04
- Course.TTCID = 1 or 2

The process starts performing the derivation steps for Course.BITTM only if all three conditions are met. If all three conditions are not met, the process leaves the field value as blank.

Important! Oracle recommends that you use the Extract Data pages to review and correct all the values that are derived as *NULL ERROR* before submission to HESA. .

For information about the Extract Data pages, see Understanding Generating a HESA Return and Creating a Return File

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Note: To derive a field value, the Create Extract process uses the most recent effective-dated record that falls on or before the end of the reporting period.
Exceptions to this rule are noted in this HESA field derivation documentation.

The following table lists the navigation paths for the pages mentioned throughout the HESA field derivation documentation:

Page	***Navigation***
Program HESA Data	Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Program HESA Data
Program Offering/Year HESA	Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Program Offering/Year HESA
Plan HESA Data	Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > Plan HESA Data
Plan Offering/Year HESA	Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table > Plan Offering/Year HESA

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Page	***Navigation***
Sub-Plan HESA	Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table > Sub-Plan HESA
Sub-Plan Offering/Year HESA	Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table > Sub-Plan Offering/Year HESA
HESA Module Data	Curriculum Management > Course Catalog > HESA Module Details
HESA Returns	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Returns
Student Program	Records and Enrollment > Career and Program Information > Student Program/Plan
HESA Instance	Records and Enrollment > Career and Program Information > HESA Instance Details > HESA Instance
Entry Profile	Records and Enrollment > Career and Program Information > HESA Instance Details > Entry Profile
HESA Action Reasons	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Action Reasons
HESA Types	Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns Setup > HESA Types
External System ID	Campus Community > Personal Information (Student) > Identification (Student) > External System ID
Person HESA Data	Campus Community > Personal Information > Add/Update a Person > Person HESA Data
Enter DLHE Survey (self-service)	Click the Enter Survey button on the Survey Management page (Records and Enrollment > HESA Reporting > Destination of Leavers > Survey Management). Click the Enter DLHE Survey link on the Student Center page (Self Service, Student Center).
Survey Details	Click the Details button on the Survey Management page.

For information about these pages and how to generate HESA Returns, see

- Setting Up a HESA Return
- Setting Up and Entering Data for HESA Reporting
- Preparing for Generating DLHE Return
- Generating a HESA Return and Creating a Return File

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Note: This documentation about HESA field derivation describes the delivered functionality for deriving the HESA return fields. You can use the Institution Data Capture page to determine at which level you can enter data for field derivation. For more information about the Institution Data Capture page see: Setting Up and Entering Data for HESA Reporting

Oracle recommends that you review the return type specification that is available from the HESA website for field descriptions, validations, and valid field values.

See http://www.hesa.ac.uk.

Student Record Return: Institution Entity

The Create Extract process creates a single Institution entity. The Institution entity is composed of three fields.

Indicator for HEFCE Funding Approximations (INSTAPP)

Return: Student Record

Entity: Institution

Page Used:

Page	*Page Element*
HESA Returns	INSTAPP

Field Derivation Rule: If the country is England or Northern Ireland, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as *NULL ERROR.*

Record Type Indicator (RECID)

Return: Student Record

Entity: Institution

Pages Used:

Page	*Page Element*
Reporting Periods (Records and Enrollment > HESA Reporting > HESA Returns Setup > Reporting Periods)	Record Year
Returns (Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns)	Record ID

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Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where *YY* is the final two digits of the Record Year (for example, 09 for 2009) and *NNN* is the 3-digit Record ID for the seeded return.
2. Derive as *NULL ERROR.*

For Student Return 2009/10, the Record ID must be 051 and the Record Year for the Reporting Period must be 2009. The correct Record ID and Record Year for Student Return 2009/10 are delivered with your system.

UK Provider Reference Number (UKPRN)

Return: Student Record

Entity: Institution

Page Used:

Page	***Page Element***
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as *NULL ERROR.*

Student Record Return: Course Entity

If you select the Include Course Entities check box on the Create Extract Data page, the Create Extract process creates Course entities based on the academic plans and academic subplans of the institution that are active and have been set up as eligible for reporting to HESA on the Plan HESA Data or the Sub-Plan HESA page.

If you select the Enable Sub-Plan Reporting check box on the HESA Returns page, the Create Extract process looks at both subplans and plans with the Report to HESA check box selected. If you did not select the Enable Sub-Plan Reporting check box on the HESA Returns page or if no subplan records are marked for reporting to HESA, then the extract process looks at only plan records for deriving the Course fields.

Note: You can specify an academic subplan, academic plan, or both on the Create Extract Data page to test the Create Extract process for a single plan or subplan. The process then uses the specified subplan or plan to create the Course entities. You must select the Enable Sub-Plan Reporting check box on the HESA Returns page if you want to specify a subplan on the Create Extract Data page.

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If you have specified an academic career on the Create Extract Data page and no plan, the process includes only those plans that are related to the specified academic career either by looking at the Academic Career field on the Academic Plan Table page or by looking at the parent Academic Program settings (Academic Program field on the Academic Plan Table page and then Academic Career field on the Academic Program Table page).

If you have specified an academic career on the Create Extract Data page and no subplan, the process includes only those subplans whose parent Academic Plan is related to the Academic Career either directly (Academic Career field on the Academic Plan Table page) or by looking at the parent Academic Program settings (Academic Program field on the Academic Plan Table page, and then the Academic Career field on the Academic Program Table page).

If you have specified an academic plan on the Create Extract Data page and no subplan, the process includes only those subplans that are related to the specified plan by looking at the Academic Plan field on the Academic Sub-Plan Table page.

If you have selected the Null Errors Only check box for the Include Course Entities on the Create Extract Data page, the process selects distinct COURSEID values from the existing active Course extract data, where at least one field in the Course or Course Subject extract data has a Derived Value of *NULL ERROR.* The process then selects Course entity records for these COURSEIDs.

If you have selected the Validation Errors Only check box for the Include Course Entities, the process first deletes any Validation Error staging records where all of the COURSEID, MODID and EMPLID fields are blank. Then, it selects distinct COURSEID values from the Validation Error staging table for rows where COURSEID is not blank and EMPLID is blank. The process selects Course entity records for these COURSEIDs. Finally, it deletes records from the Validation Error staging table where COURSEID is populated and EMPLID is blank.

Awarding Body 1 (AWARDBOD)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	AWARDBOD
Plan HESA Data	AWARDBOD
Sub-Plan HESA	AWARDBOD

Field Derivation Rule: Derive a value if the following conditions are met:

- Course.COURSEAIM begins with D, E, L, M, H, I, J or C.
- Course.COURSEAIM does not end with 99 (that is, H99, L99, M99, I99, J99, C99).

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

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1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Default to the derived Institution.UKPRN value.

Awarding Body 2 to 8 (AWARDBOD2 to 8)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	AWARDBOD2 to 8
Plan HESA Data	AWARDBOD2 to 8
Sub-Plan HESA	AWARDBOD2 to 8

Field Derivation Rule: Derive a value if the following conditions are met:

- Course.COURSEAIM begins with D, E, L, M, H, I, J or C.
- Course.COURSEAIM does not end with 99 (that is, H99, L99, M99, I99, J99, C99).

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If Course.AWARDBOD was derived from a subplan (derivation step 2 in the previous subsection), derive from the Sub-Plan HESA page.
2. If Course.AWARDBOD was derived from a plan (derivation step 3 in the previous subsection), derive from the Plan HESA Data page.
3. If Course.AWARDBOD was derived from a program (derivation step 4 in the previous subsection), derive from the Program HESA Data page.
4. Do not derive a value and leave the field blank.

Bilingual ITT Marker (BITTM)

Return: Student Record

Entity: Course

Pages Used:

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Page	Page Element
Program HESA Data	BITTM
Plan HESA Data	BITTM
Sub-Plan HESA	BITTM

Field Derivation Rule: Derive a value only if the following conditions are met:

- Country = Wales, Scotland, or Northern Ireland
- Course.REDUCEDC = 00, 01, or 04
- Course.TTCID = 1 or 2

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

Closed Course (CLSDCRS)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	CLSDCRS
Plan HESA Data	CLSDCRS
Sub-Plan HESA	CLSDCRS

Field Derivation Rule: Derive a value only if the following conditions are met:

- Country = England
- Course.REDUCEDC = 00

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- Course.COURSEAIM is not Z99

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *0*.

Collaborating Organization (COLLORG)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	COLLORG
Plan HESA Data	COLLORG
Sub-Plan HESA	COLLORG

Field Derivation Rule: Derive a value only if the following conditions are met:

- Country = England
- Course.REDUCEDC = 00
- Course.COURSEAIM does not equal D00, D01, D90, L00, L80, L90, L91, L99, or Z99

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.

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6. Derive as *NULL ERROR.*

General Qualification Aim of Course (COURSEAIM)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	COURSEAIM
Plan HESA Data	COURSEAIM
Sub-Plan HESA	COURSEAIM

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

Course Identifier (COURSEID)

Return: Student Record

Entity: Course

Pages Used: None

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. If the Course entity is based on a subplan, derive from the Academic Sub-Plan Table record.
2. Derive from the Academic Plan Table record.

Course Title (CTITLE)

Return: Student Record

Entity: Course

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Pages Used:

Page	***Page Element***
Plan HESA Data	Course Title
Sub-Plan HESA	HESA Course Title
Academic Plan Table (Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table)	Academic Plan
Academic Sub-Plan Table (Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table)	Academic Subplan

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. If the Course entity is based on a subplan, derive from the Sub-Plan HESA page.

   If the Course Title field does not have a value, use a combination of the plan and subplan descriptions from the Academic Plan Table and Academic Sub-Plan Table pages.

2. Derive from the Plan HESA Data page.

   If the Course Title field does not have a value, use the plan description from the Academic Plan Table page.

FE General Qualification Aim (FEQAIMC)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	FEQAIMC
Plan HESA Data	FEQAIMC
Sub-Plan HESA	FEQAIMC

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.

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5. Use default.
6. Do not derive a value and leave the field blank.

Major Source of Funding (MSFUND)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	MSFUND
Plan HESA Data	MSFUND
Sub-Plan HESA	MSFUND

Field Derivation Rule: Derive a value if Course.REDUCEDC = 00, 01 or 04. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. If Country = Scotland, Northern Ireland or Wales, derive as *NULL ERROR.*
7. Do not derive a value and leave the field blank.

NHS Bursaries (NHSBURSARY)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	NHSBURSARY
Plan HESA Data	NHSBURSARY
Sub-Plan HESA	NHSBURSARY

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Field Derivation Rule: Derive a value if Country = Northern Ireland, England or Wales and REDUCEDC = 00

Derivation Steps:

1. Use Constant.
2. If the Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.
3. Derive from Plan HESA Data.
4. Derive from Program HESA Data
5. Use default.
6. Derive as *NULL ERROR.*

Own Course Identifier (OWNCOURSEID)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Plan HESA Data	OWNCOURSEID
Sub-Plan HESA Data	OWNCOURSEID

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. If Course entity is based on a subplan, derive from the Sub-Plan HESA Data page.
2. Derive from the Plan HESA Data page.
3. Do not derive a value and leave the field blank.

Reduced Course Return Indicator (REDUCEDC)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	REDUCEDC
Plan HESA Data	REDUCEDC

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Page	Page Element
Sub-Plan HESA	REDUCEDC

Field Derivation Rule: Include for all Course entities.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

Regulatory Body for Health and Social Care Students (REGBODY)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	REGBODY
Plan HESA Data	REGBODY
Sub-Plan HESA	REGBODY

Field Derivation Rule: Derive a value if the following conditions are met:

- Course.COURSEAIM = M16, M26, M76, M86, H16, H62, H76, I16, I76, J26, or J76
- Course.REDUCEDC = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.

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6. Derive as *NULL ERROR.*

Regulatory Body for Health and Social Care Students 2 (REGBODY2)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	REGBODY
Plan HESA Data	REGBODY
Sub-Plan HESA	REGBODY

Field Derivation Rule: Derive a value if the following conditions are met:

- Course.COURSEAIM = M16, M26, M76, M86, H16, H62, H76, I16, I76, J26, or J76
- Course.REDUCEDC = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL*.

Subject Knowledge Enhancement Units (SKEUNITS)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	SKEUNITS
Plan HESA Data	SKEUNITS

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Page	Page Element
Sub-Plan HESA	SKEUNITS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 07 (SKE) or Course.TTCID = F (SKE)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use Constant.
2. If the Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.
3. Derive from Plan HESA Data.
4. Derive from Program HESA Data
5. Use default.
6. Derive as *NULL ERROR.*

Subject Knowledge Enhancement Placement (SKEOS)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	SKEOS
Plan HESA Data	SKEOS
Sub-Plan HESA	SKEOS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 07 (SKE) or Course.TTCID = F (SKE)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use Constant.
2. If the Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.

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3. Derive from Plan HESA Data.
4. Derive from Program HESA Data
5. Use default.
6. Derive as *NULL ERROR.*

Teaching Qualification Sought Sector (TQSSEC)

Return: Student Record

Entity: Course

Pages Used:

Page	***Page Element***
Program HESA Data	TQSSEC
Plan HESA Data	TQSSEC
Sub-Plan HESA	TQSSEC

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland or Northern Ireland
- Course.REDUCEDC = 00
- Course.TTCID = 1 or 2

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

Teaching Qualification Sought Subject (TQSSUB)

Return: Student Record

Entity: Course

Pages Used:

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Page	Page Element
Program HESA Data	TQSSUB, TQSSUB2, TQSSUB3
Plan HESA Data	TQSSUB, TQSSUB2, TQSSUB3
Sub-Plan HESA	TQSSUB, TQSSUB2, TQSSUB3

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Course.REDUCEDC = 00
- Course.TQSSEC = 2

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant to create a single TQSSUB field.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default to create a single TQSSUB field.
6. Derive a single TQSSUB field as *NULL ERROR.*

Note: The system can derive up to three values. Each of the values is included as a separate TQSSUB field in the XML file.

Teacher Training Course (TTCID)

Return: Student Record

Entity: Course

Pages Used:

Page	Page Element
Program HESA Data	TTCID
Plan HESA Data	TTCID
Sub-Plan HESA	TTCID

Field Derivation Rule: Derive a value if one of the following conditions is met:

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- Country = England, Northern Ireland or Scotland AND Course.REDUCEDC = 00, 01, 04, 07 or 09 AND Course.COURSEAIM is not Z99
- Country = Wales AND Course.COURSEAIM does not begin with P, Q, R, S or X and is not Z99 AND Course.REDUCEDC = 00, 01, 04, 07 or 09.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

Student Record Return: Course Subject Entity

If you select the Include Course Entities check box on the Create Extract Data page, the Create Extract process creates Course Subject entity records for each Course entity. The process can create a maximum of three Course Subject entity records for each Course entity.

The derivation of Course Subject fields may vary depending on whether the parent Course entity is based on a subplan or plan record.

Subject of ITT Specialism Indicator (ITTSUBJECT)

Return: Student Record

Entity: Course Subject

Pages Used:

Page	***Page Element***
Program HESA Data	HESA Subject ITT Subject Flag
Plan HESA Data	HESA Subject ITT Subject Flag
Sub-Plan HESA	HESA Subject ITT Subject Flag

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Note: The system identifies a HESA subject as an ITT subject only if the ITT Subject Flag check box is selected for the HESA subject.

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.TTCID = 1, 8, or G

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Subject of Course (SBJCA)

Return: Student Record

Entity: Course Subject

Pages Used:

Page	*Page Element*
Program HESA Data	HESA Subject
Plan HESA Data	HESA Subject
Sub-Plan HESA	HESA Subject

Field Derivation Rule: Include for all Course Subject entities.

Derivation Steps:

1. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Subject Percentage (SBJPCNT)

Return: Student Record

Entity: Course Subject

Pages Used:

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Page	*Page Element*
Program HESA Data	HESA Subject Percentage
Plan HESA Data	HESA Subject Percentage
Sub-Plan HESA	HESA Subject Percentage

Field Derivation Rule: Include for all Course Subject entities.

Derivation Steps:

1. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Student Record Return: Module Entity

If you select the Include Module Entities check box on the Create Extract Data page, the Create Extract process creates the Module entities. To create Module entities, the process uses the institution's Course Offering records that are active and have been set up as eligible for reporting to HESA. You must select the Report to HESA check box on the HESA Module Data page to make a course offering record eligible for HESA reporting.

If HESA Module Data records do not exist, the process does not include the course offerings in the Module entity. The process includes dummy modules in the module entity.

Note: When you run the Create Extract process, you can choose to enter the course ID or course offering number as a run parameter for testing purposes. The Create Extract process then uses the specified course ID or course offering number to create the Module entities.

If you have selected an academic career and no course offering on the Create Extract Data page, then the process selects only those course offerings that are related to the selected career.

If you have selected the Null Errors Only check box for the Include Module Entities on the Create Extract Data page, the Create Extract process selects distinct MODID values from the existing active Module extract data, where at least one field in the Module or Module Subject extract data has a Derived Value of *NULL ERROR.* The process then selects Module entity records for these MODIDs.

If you have selected the Validation Errors Only check box for the Include Module Entities, the Create Extract process first deletes any Validation Error staging records where all of the COURSEID, MODID and EMPLID fields are blank. Then, it selects distinct MODID values from the Validation Error staging table for rows where MODID is not blank and EMPLID is blank. The process selects Module entity records for these MODIDs. Note that the File Parser process removes the leading zeroes from MODID, therefore, the comparison of MODID with Course ID and Course Offering Number includes the logic to correctly match the values. The system makes an assumption that the Course Offering Number is a single digit. Finally, the Create Extract process deletes records from the Validation Error staging table where MODID is populated and EMPLID is blank.

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Credit Value of Module (CRDTPTS)

Return: Student Record

Entity: Module

Page Used:

Page	*Page Element*
HESA Module Data	CRDTPTS
Catalog Data (Curriculum Management, Course Catalog, Catalog Data)	Maximum Units, Academic Progress Units, Enrollment Unit Load Calc Type

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Select the Course Catalog record for the Course ID. If the Enrollment Unit Load Calc Type value is *Academic Progress Units,* derive from the Academic Progress Units value. If the Enrollment Unit Load Calc Type value is any other value, derive from the Maximum Units value. Round off the fractional values to the nearest whole number. This step is not performed for dummy modules.
4. Use default.
5. Derive as *NULL ERROR.*

Credit Transfer Scheme (CRDTSCM)

Return: Student Record

Entity: Module

Page Used:

Page	*Page Element*
HESA Module Data	CRDTSCM

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.

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4. Derive as *NULL ERROR.*

Module Franchise Indicator (FRANIND)

Return: Student Record

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	FRANIND

Field Derivation Rule: If Country = Wales, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Do not derive a value and leave the field blank.

Note: The HESA specification indicates that the Module.FRANIND coverage also includes Course.COURSEAIM that begins with D, E, L, M, H, I, J or C, however, the extract process cannot check this as there is no direct link to the Course entity.

Module FTE (FTE)

Return: Student Record

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	FTE

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.

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4. Derive as *NULL ERROR.*

Level of Credit Points (LEVLPTS)

Return: Student Record

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	LEVLPTS

Field Derivation Rule: If Module.CRDTPTS does not equal 999, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Module Identifier (MODID)

Return: Student Record

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	Course ID Course Offering Nbr

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Derive as combination of Course ID plus Course Offering Number (CRSE_ID and CRSE_OFFER_NBR column values from PS_CRSE_OFFER). For example, if Course ID = 001248 and Offering Number = 2, then MODID = 0012482.

Module Taught in a Celtic Language (MODLANG)

Return: Student Record

Entity: Module

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Page Used:

Page	Page Element
HESA Module Data	MODLANG

Field Derivation Rule: If Country = Northern Ireland, Scotland, or Wales, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Module Title (MTITLE)

Return: Student Record

Entity: Module

Page Used:

Page	Page Element
HESA Module Data	Short description that appears on the right of Course ID page element
HESA Dummy Module Data	Year

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page for standard modules. If short description is unavailable on the HESA Module Data page, derive as the description of the parent Course Catalog record.

   For dummy modules, the MTITLE is derived as a combination of the Plan description, the text *Year,* and the year value of the dummy module record separated by spaces. For example, for Academic Plan = BA ENG with description BA English and Year = 2, MTITLE is derived as *BA English Year 2.*
3. Use default.
4. Derive as *NULL ERROR.*

Percentage Not Taught By This Institution (PCOLAB)

Return: Student Record

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Entity: Module

Page Used:

Page	*Page Element*
HESA Module Data	PCOLAB

Field Derivation Rule: Include for all Module entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Other Institution Providing Teaching (TINST)

Return: Student Record

Entity: Module

Page Used:

Page	*Page Element*
HESA Module Data	TINST

Field Derivation Rule: If Module.PCOLAB is greater than zero, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Student Record Return: Module Subject Entity

If you select the Include Module Entities check box on the Create Extract Data page, the Create Extract process creates a maximum of 16 Module Subject entity records for each Module entity. To create the Module Subject entity records, the process uses the subject records for each Module record. Each module subject is a combination of Cost Center and Subject. The Module HESA Data page ensures that each combination of Cost Center and Subject is unique and the total percentage equals 100.

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If you have not defined subjects on the Module Subjects region of the HESA Module Data page, then the process creates a single Module Subject entity record. The process derives the values for each field within the entity using the constant or default value defined on the HESA Fields page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns Setup, HESA Fields). If a constant or default is not available, the process derives the value as *NULL ERROR*. Note that if you have defined a constant, the process does not examine any subjects defined on the HESA Module Data page (that is, the process does not execute derivation step 2 for the Module Subject fields).

Cost Centre (COSTCN)

Return: Student Record

Entity: Module Subject

Page Used:

Page	***Page Element***
HESA Module Data	Cost Centre

Field Derivation Rule: Include for all Module Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use Default.
4. Derive as *NULL ERROR.*

Subject of Module (MODSBJ)

Return: Student Record

Entity: Module Subject

Page Used:

Page	***Page Element***
HESA Module Data	Subject

Field Derivation Rule: Include for all Module Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use Default.

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4. Derive as *NULL ERROR.*

Subject/Cost Centre Percentage (MODSBJP)

Return: Student Record

Entity: Module Subject

Page Used:

Page	***Page Element***
HESA Module Data	Percentage

Field Derivation Rule: Include for all Module Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use Default.
4. Derive as *NULL ERROR.*

Student Record Return: Student Entity

The Create Extract process creates a single Student entity for each student included in the Instance entity. However, it is possible for a student to have multiple distinct Instances for a particular return. In this case, only one Student entity will be created.

The process creates the Student entities only if the Include Student Entities check box is selected on the Create Extract Data page.

The process uses each distinct HESA unique student identifier (HUSID) to create a Student entity. The process also uses the student's EMPLID to link the HUSID with the person data to derive fields within the Student entity. The process creates the Student entity after creating all the other entities because of the dependency on values derived for the Course, Instance, and Entry Profile fields.

Date of Birth (BIRTHDTE)

Return: Student Record

Entity: Student

Page Used:

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Page	Page Element
Biographical Details (Campus Community > Personal Information (Student) > Add/Update a Person > Biographical Details)	Date of Birth

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Biographical Details page in the format YYYY-DD-MM.
2. Derive as null.

Carer (CARER)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
Person HESA Data	CARER

Field Derivation Rule: If all the following conditions are met, a value is derived:

- Country = Scotland
- Student has any one of the following:
  - An EntryProfile in the extract with DOMICILE = XH
  - Any HESA Entry Profile record with DOMICILE = XH. Consider all records for the student (based on EMPLID), regardless of effective date or career or instance.
  - A Residency Self-Report record where the mapped two-character country code is XH. All student records are considered, based on EMPLID, regardless of effective date.

Derivation Steps:

1. Derive from Person HESA Data.
2. Use default.
3. Derive as NULL ERROR.

Disability (DISABLE)

Return: Student Record

Entity: Student

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Pages Used:

Page	Page Element
Person HESA Data	DISABLE
Impairment AUS (Campus Community > Personal Information > Health Information > Impairment AUS)	Type of Impairment
Disability (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Disability)	HESA Disability Code

Field Derivation Rule: If the student has at least one Instance with REDUCEDI = 00, 01 or 07, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. If the student has a single impairment record, use the HESA Disability code from the mapping between the impairment type and the HESA disability code.
3. If the student has multiple mapped impairment records and all the records are mapped to a single HESA disability code, derive the HESA code.
4. If the student has multiple mapped impairment records and the records are mapped to more than one HESA disability code other than 00, 97, 98, or 99, then derive ‘08’ (multiple disabilities).
5. If the student has multiple mapped impairment records and only one record is mapped to a HESA disability code other than 00, 97, 98, or 99, then derive as *NULL ERROR*.
6. If the student has multiple mapped impairment records and the records are all mapped to HESA disability codes 00, 97, 98, or 99, then derive the lowest mapped HESA code.

   Note: Note: If all records are mapped to the same code, it is derived in step 3.

7. Use default.
8. Derive as *NULL ERROR.*

You can define a default as either *00* (no known disability) or *99* (not known).

Ethnicity (ETHNIC)

Return: Student Record

Entity: Student

Pages Used:

Page	Page Element
Person HESA Data	ETHNIC

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Page	*Page Element*
Ethnicity (Campus Community > Personal Information (Student) > Biographical (Student) > Personal Attributes > Ethnicity)	Regulatory Region, Ethnic Group
Ethnicity (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Ethnicity)	HESA Ethnic Code
Country Description (Set Up Common Objects >Install >Country Table >Country Description) See: • "Administering Country Codes" (PeopleSoft Campus Solutions 9.2: Campus Community) • "Understanding CS-to-HCM Integration" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)	2-Char Country Code

Field Derivation Rule: Derive a value if the following conditions are met:

- Student has at least one Instance with REDUCED = 00, 01, 07 or 08.
- One of the following is true (a, b, c or d):
  - a. Student has a related Entry Profile in the extract with DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM.
  - b. Student has a HESA Entry Profile record with DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM. All student records are considered, based on EMPLID, irrespective of effective date or career/instance.
  - c. Student has a Residency Self-Report record where Country = GBR or the mapped 2-character country code is XF, XG, XH, XI, XK, XL, GG, JE, or IM. All student records are considered, based on EMPLID, irrespective of effective date.
  - d. Country = England and Course.TTCID is 1

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Select Person Ethnicity records as follows:
   - If a single record exists, use that record.
   - If multiple records exist and one is marked as Primary on the Campus Community Ethnicity page, use that record.
   - If multiple records exist and none are marked as Primary, select the record with the highest Percentage defined in the Ethnicity Detail page.

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- If multiple records are indistinguishable, select the the most recent record based on last updated date (LASTUPDDTTM from ETHNICITY_DTL).
- For the selected record, use the HESA Ethnic code from the mapping between the Ethnic Group, Regulatory Region, and the HESA Ethnic code. If no mapping exists, log an error message and skip to next step.

3. Use default.
4. Derive as *NULL ERROR.*

Forenames (FNAMES)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Names (Campus Community > Personal Information (Student) > Add/Update a Person > Biographical Details > Names)	First Name Middle Name

Field Derivation Rule: If a student has at least one Instance with REDUCEDI = 00, 01, 04, or 08 derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use the First Name and Middle Name values from the Primary Name record.
2. Derive as null.

Gender (GENDER)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Biographical Details (Campus Community , Personal Information (Student), Add/Update a Person, Biographical Details)	Gender

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Gender value from the Biographical History record.

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If the gender value is Male, derive as *1*.

If the gender value is Female, derive as *2*.

If the gender value is unknown, derive as *9*.

2. Use default.
3. Derive as *NULL ERROR*.

Note: The GENDER field has been replaced with SEXID for 2012/13 onwards.

Gender Identity (GENDERID)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Person HESA Data	GENDERID

Field Derivation Rule: If Instance.REDUCEDI = 00, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default.
3. Do not derive a value and leave the field blank.

HESA Unique Student Identifier (HUSID)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Select External System ID records for the person with the External ID Type defined for HUSID in the HESA Types page.

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Validate that the derived value is in the correct format (refer to the Notes section for HUSID available on the HESA website). If the value is invalid, log an error message.

Nationality (NATION)

Return: Student Record

Entity: Student

Pages Used:

Page	***Page Element***
Person HESA Data	NATION
Citizenship and Passport (Campus Community , Personal Information (Student), Identification (Student), Citizenship, Citizenship and Passport)	Country
Nationality (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Nationality)	HESA Nationality Code

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Select person citizenship records and retrieve the related two-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL). If a mapping exists in the HESA Nationality Code page for the Campus Solutions Country code, use the mapped HESA value else use the COUNTRY_2CHAR value.

   If a single record exists, derive the Campus Solutions country code or HESA country code.
3. If multiple person citizenship records are found and a record has a value of *GB,* derive as *GB.*
4. If multiple records are found, and none have the *GB* country value but a minimum one record has a country value that is marked as European Union (EU) country then derive the EU country. If there are multiple EU countries report the one with the lowest alphabetic HESA code. Note that the PS_COUNTRY_TBL contains an indicator (EU_MEMBER_STATE) to specify if the country is a member of the EU.
5. If multiple records are found and none have the UK or EU value, select the lowest alphabetic code
6. Use default.
7. If the student has at least one Instance with REDUCEDI = *00* or *03*, COMDATE is on or after 2007-08-01, and Country is not Northern Ireland, derive as *NULL ERROR* else do not derive a value and leave the field blank.

In most cases, you can use the Campus Solutions two-character country code to report the NATION value. However, some Campus Solutions country codes are not valid for HESA reporting. For example, the Campus Solutions Cyprus code (CY) cannot be reported. Cyprus has to be reported as *XA, XB,* or *XC.*

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In these cases, you must use the Nationality code mapping page to ensure the correct NATION values are reported to HESA.

National Identity (NATIOND)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Person HESA Data	NATIOND

Field Derivation Rule: Derive a value if the following conditions are met.

For Country = Wales:

- Student has at least one Instance with REDUCEDI = 00.
- Any one of the following:
  - Student has a related EntryProfile in the extract with DOMICILE = XI (Wales)
  - Student has any HESA Entry Profile record with DOMICILE = XI. Consider all records for the student (based on EMPLID), irrespective of effective date or career/instance.
  - Student has any Residency Self-Report record where country = GBR and the combination of Country and State is mapped to a HESA Country Code = XI in the UCAS Area of Permanent Residence page. Consider all records for the student (based on EMPLID), irrespective of effective date.

For Country = England: include for all students

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default.
3. If Country = Wales, derive as NULL ERROR
4. Derive as NULL.

National Identity (NATIOND2)

Return: Student Record

Entity: Student

Page Used:

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Page	Page Element
Person HESA Data	NATIOND2

Field Derivation Rule: Derive a value if the following conditions are met.

For Country = Wales:

- Student has at least one Instance with REDUCEDI = 00.
- Any one of the following:
  - Student has a related EntryProfile in the extract with DOMICILE = XI (Wales)
  - Student has any HESA Entry Profile record with DOMICILE = XI. Consider all records for the student (based on EMPLID), irrespective of effective date or career/instance.
  - Student has any Residency Self-Report record where country = GBR and the combination of Country and State is mapped to a HESA Country Code = XI in the UCAS Area of Permanent Residence page. Consider all records for the student (based on EMPLID), irrespective of effective date.

For Country = England: include for all students

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default.
3. Derive as NULL.

ORCID Identifier (ORCID)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
External System ID (Campus Community, Personal Information (Student), Identification (Student), External System ID)	External System ID
Additional Information (Records and Enrollment, Graduate Research Management, Candidate Management, Consumption and Submission, Additional Information)	UK Research ORCID
HESA Types (Records and Enrollment, HESA Returns Setup, Returns Setup, HESA Types)	External ID Types

Field Derivation Rule: Include for all Student entities.

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Derivation Step:

1. If there is a Research Candidate record for the instance, select the value of the CAF attribute defined for ORCID in Returns Setup from the most recent active consumption record, where the effective date is on or before the reporting period end date.
2. Select External System ID records for the person with the External System ID Type defined for ORCID in the HESA Return Setup record.
3. Derive as null.

Note: Although the ORCID field is optional for HESA reporting, the system derives this field value for research council students to assist with record identification.

Institution's Own Identifier for Student (OWNSTU)

Return: Student Record

Entity: Student

Pages Used: None

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Derive as EMPLID.

Note: Although the OWNSTU field is optional for HESA reporting, the system derives this field value for all students to assist with record identification.

Religion or Belief (RELBLF)

Return: Student Record

Entity: Student

Pages Used:

Page	***Page Element***
Person HESA Data	RELBLF
Religious Preference (Campus Community, Personal Information, Biographical, Personal Attributes, Religious Preferences).	Religious Preference
Religion (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Religion)	HESA Belief

Field Derivation Rule: Include for all entities

Derivation Steps:

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1. Derive from the Person HESA Data page.
2. Select the religious preference from the personal information record. Use the mapping on the Religion page to derive the RELBLF code.
3. Use default.
4. Derive as NULL ERROR.

Sex Identifier (SEXID)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Biographical Details (Campus Community , Personal Information (Student), Add/Update a Person, Biographical Details)	Gender
Gender (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Gender)	HESA Identifier
Campus Community, Personal Information, Add/Update a Person, HESA Student Data	SEXID
Campus Community, Personal Information, Add/Update a Person, HESA Restricted Data	SEXID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from Person HESA Data.
2. Select the Gender value from the Biographical History record. Derive as the mapped HESA value for the selected Gender value.
3. If no mapping is found, then derive as:
   - If the gender value is Male, derive as *1*.
   - If the gender value is Female, derive as *2*.
4. Use default.
5. Derive as *NULL ERROR.*

Sexual Orientation (SEXORT)

Return: Student Record

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Entity: Student

Page Used:

Page	*Page Element*
Person HESA Data	SEXORT
Personal (Campus Community, Personal Information, Add/ Update a Person)	Sexual Orientation

Field Derivation Rule: If Instance.REDUCEDI = 00, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. (Applies only to Campus Solutions 9.2) If a coded value exists in the Person Biographic record and the value is mapped to a HESA code in the Orientation mapping, derive the HESA code.
3. Use default.
4. Do not derive a value and leave the field blank.

Scottish Candidate Number (SCN)

Return: Student Record

Entity: Student

Page Used:

Page	*Page Element*
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Student has an Instance related to a Course entity that has Course.COURSEAIM beginning with H, I, J, C, P, Q, R, or S
- Either EntryProfile.UCASAPPID exists or Country = Scotland

  EntryProfile.UCASAPPID exists if one of the following is found:

  - Student has an Entry Profile in the extract with an EntryProfile.UCASAPPID value.
  - Student has a HESA Entry Profile record with an EntryProfile.UCASAPPID value.
  - An External Application Number exists in the Campus Solutions admission application record and this record is related to the student program record for an Instance being reported for the student.

- One of the following is true (a, b, or c):

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- a. Student has a related EntryProfile in the extract with EntryProfile.DOMICILE = XH (Scotland).
- b. Student has any HESA Entry Profile record with EntryProfile.DOMICILE = XH. Consider all records for the student (based on EMPLID) irrespective of effective date or career/instance.
- c. Student has any Residency Self-Report record where the country = XH. Or the student has any Residency Self-Report record where the country = GBR and the combination of Country and State is mapped to a HESA Country Code = XH in the UCAS Area of Permanent Residence page. Consider all records for the student (based on EMPLID) irrespective of effective date.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for SCN in the HESA Types page. Value should not be *999999999*.
2. Derive as null.

Dependants in Reporting Year (SDEPEND)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Person HESA Data	SDEPEND

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Student has at least one Instance with REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default.
3. Derive as *NULL ERROR*.

Family Name on 16th Birthday (SNAME16)

Return: Student Record

Entity: Student

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Page Used:

Page	*Page Element*
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note: The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Last Name value from the Primary Name record. The last name must have a Type of Name value that corresponds with the Name Type set for SNAME16 in the HESA Types page.
2. Do not derive a value and leave the field blank.

Student Support Number (SSN)

Return: Student Record

Entity: Student

Pages Used:

Page	*Page Element*
SSAR (Financial Aid, Student Loans Company, View SLC Student Data, SSAR)	Student Support Nbr
HESA Instance	SSN

Field Derivation Rule: Derive a value if the following conditions are met:

- Student has at least one instance where the related Course.COURSEAIM begins with H, I, J, C, P, Q, R, S or X, or is M22, M26, M28, M71, M73, or M88
- Related Course.COURSEAIM does not end with 90 or 99

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance page for each related Instance that meets the COURSEAIM condition.

   If different multiple SSN values are found, select the value from the HESA instance with the most recent COMDATE.

2. Derive the SSN from the most recent Attendance Confirmation Report (ACR) record (that is, highest sequence number) for the EMPLID and Institution where:

   - The Aid Year start date falls on or before the reporting period end date.

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- The Aid Year end date is not before the reporting period start date for the reporting period in which Instance.COMDATE falls.
- At least one row exists for the ACR with Attendance Indicator set to any value other than *S* or *X*.

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 have one and not the other.

3. Derive the SSN from the most recent SSAR record (that is, highest sequence number) for the EMPLID and institution where:
   - The Aid Year start date falls on or before the reporting period end date.
   - The Aid Year end date is not before the reporting period start date for the reporting period in which Instance.COMDATE falls.
   - A related first attendance confirmation record exists.
   - If the UCAS Course Code is defined in the SSAR, then the UCAS Course Code should be linked via a UCAS Course Mapping to the same career and program as an Instance being reported for the student. If the UCAS Course code is not defined in the SSAR, or if there are no UCAS Course Mapping records for the UCAS Course Code, then the SSAR record is assumed to be relevant to the Instance. You perform UCAS CourseMapping on the UCAS Courses page (Set Up SACR, Product Related, Recruiting and Admissions, UCAS,Mappings, UCAS Course).
4. Do not derive a value and leave the field blank.

Note: The SSN derivation does not currently consider whether Instance.MSTUFEE is reported as SLC full or partly funded (02, 03, 04, 52, 53 or 54).

Family Name (SURNAME)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note: The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: Include for all entities

Derivation Steps:

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1. The Last Name value of the most recent effective dated name record with a name type defined for the return for SNAMECHNGE is selected.
2. Derive as *NULL ERROR.*

Term-time Accommodation (TTACCOM)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Person HESA Data	TTACCOM

Field Derivation Rule: Derive a value if the following conditions are met:

- The student has at least one Instance with REDUCEDI = 00
- LOCSDY does not equal S
- MODE = 01, 02, 23, 24, or 25

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default
3. Derive as *NULL ERROR.*

Term-time Postcode (TTPCODE)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Person HESA Data	TTPCODE
Addresses (Campus Community, Personal Information (Student), Biographical (Student), Addresses/Phones, Addresses)	Postal

Field Derivation Rule: Derive a value if one of the following conditions is met:

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- Country = England, Northern Ireland, or Scotland, the student has at least one Instance with Instance.REDUCEDI = 00 or 07, AND Instance.LOCSDY is blank or does not equal 6, 9, D, S or T.
- Country = Wales, the student has at least one Instance with Instance.REDUCEDI = 00 or 07, Instance.LOCSDY does not equal 6, 9, D, S or T AND Course.COURSEAIM does not begin with P, Q, R, S or X.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Select the most recent address record (exclude records with an effective date greater than the end date of the reporting period) that has one of the UK-related country codes. The record must have an Address Type that corresponds with the Address Type set for TTPCODE in the HESA Types page.

   The following country codes are considered as UK-related for the purposes of this derivation: GBR (United Kingdom), ENG (England), XF (England), NIR (Northern Ireland), XG (Northern Ireland), SCT (Scotland), XH (Scotland), WAL (Wales), 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.

For steps 1 and 2, the system validates that the derived post code value is in the correct format (refer to the examples for TTPCODE available on the HESA website).

UCAS Personal Identifier (UCASPERID)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- The student has an Instance with Instance.COMDATE after 2007-07-31 and
- Either EntryProfile.UCASAPPID value exists on the Entry Profile page (any effective-dated row) or the External Application Number associated with the Instance begins *UC.* Use the Student Program record of the instance to find the admission application number (ADM_APPL_NBR). Use this admission application number to find the Admissions Data record (PS_ADM_APPL_DATA). Then, from the Application Data page for this record, find the External Application Number. The External Application Number holds the UCAS Application Code plus Choice Number for a UCAS application.

Do not derive a value and leave the field blank, if the conditions are not met.

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Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for UCASPERID in the HESA Types page.
2. Derive as *NULL ERROR.*

Unique Learner Number (ULN)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for ULN in the HESA Types page.

   Validate the derived value using the checksum method. For information on the checksum method, refer to the Notes section for the ULN field available on the HESA website.
2. If Country = England and there is any instance for the student with Instance.FESTUMK = 1, 3, or 5 derive as *NULL ERROR.*
3. Do not derive a value and leave the field blank.

Welsh Speaker Indicator (WELSSP)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Person HESA Data	WELSSP

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Wales
- The student has an Instance with REDUCEDI = 00
- One of the following is true (a, b, or c):

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- (a) The student has a related EntryProfile in the extract with DOMICILE = XI
- (b) The student has any HESA Entry Profile record with DOMICILE = XI. This includes 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 and the combination of Country and State is mapped to a HESA Country Code = XI in the UCAS Area of Permanent Residence page. This includes consideration of all records for the student (based on EMPLID) irrespective of effective date.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Person HESA Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Student Record Return: Instance Entity

If you select the Include Student Entities check box on the Create Extract Data page, the Create Extract process creates Instance entities based on distinct student careers and the related HESA Instance.

The process includes a student career as an Instance entity if the following three conditions are met:

- The process has included the plan (or the subplan if the subplan rather than the plan is being reported) of the student program record as a Course entity in the extract. Note that if the student has multiple active plans the process considers the plan defined in the HESA Instance record.
- The plan or subplan is selected for COURSEID based on the most recent Student Program/Plan record on or before the reporting period end date where the program action/reason is not defined in the Award Only Mapping for the return.
- A related HESA Instance record exists for the career and academic institution with the Report To HESA check box selected.
- The student must be a *continuing student* (that is, the derived commencement date is prior to the start of the reporting period) or a *new student* (that is, the derived commencement date falls on or after the start of the reporting period).

If the student is a *continuing student,* then one of the following conditions must be satisfied:

- The student is in the HIN Population. That is, a HIN Population Year value exists in the HESA Instance record that matches the Reporting Period Year.
- You have not selected the HIN Population Only check box and the student has not left or completed prior to the reporting period. To determine whether the student has not left or completed prior to the reporting period, the process first selects the Student Program record that has an effective date nearest

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to the Reporting Period Start Date. Then, it checks whether the selected record has a Program Status that matches one of the eligible Program Statuses defined for the return on the HESA Returns page.

Note: If you have selected the check box, for each student career, the process only evaluates whether the first condition is met (that is, student is in the HIN population) and does not evaluate the second condition (that is, the student has not left or completed prior to the reporting period). In other words, if you select the check box and if the first condition is not met, the student career is not included.

If the student is a *new student,* then one of the following conditions must be satisfied:

- The student is in the HIN Population.
- The student has been term activated for at least one term that begins within the reporting period and the student has at least one enrolled class related to that term.
- The student has an FTE of greater than zero for the reporting period.

Note: The HIN Population Year value in the HESA Instance record may not exist for new students. Therefore, the process does not consider the HIN Population Only check box for selection of new students. It includes a new student based on either the class enrollment condition or the FTE condition, if the student is not in the HIN population.

The Create Extract process uses the following fields set up on the HESA Instance page for a student career:

- Academic Plan: Indicates the plan to report if the student has multiple active plans.
- Linked Career and Linked Career Number: Indicates that the student instance is associated with another instance.
- Report To HESA: If the check box is cleared, the process does not include the instance data.
- Start Date of Instance: The system calculates a value but you can use this field to override the calculated value.
- HIN Population Year: Indicates the reporting year for which the system should include the Instance in the return. You must manually enter the HIN Population Year on the HESA Instance page or import the values using the Import HIN Target List process.
- Year of Course: Indicates the year of course the student is undertaking for reporting in Instance.YEARPRG. You must update this value for each subsequent reporting period when the student has progressed to the next year of the program.
- Year of Student: Indicates the number of years the student has been undertaking the program for reporting in Instance.YEARSTU. You must update this value for each subsequent reporting period when the student has progressed to the next year of the program.

The system does not automatically calculate the Year of Course and Year of Student values on the HESA Instance page. You must use the HESA Instance page to manually enter the Year of Course and Year of Student values.

The Create Extract process derives the fields relevant to further education (FE) students only if the Include FE check box is selected on the HESA Returns page. Although you can include or exclude

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individual FE fields using the derived value for FESTUMK, the Include FE check box enables you to skip derivation of FE fields completely.

While creating Instance entities, the process checks if the student's External System ID records has a HUSID. If no records are found, the process creates a HUSID External System ID for the student with an Effective Date of the reporting period start date.

If you have selected the Null Errors Only check box for the Include Student Entities on the Create Extract Data page, the Create Extract process selects distinct EMPLIDs from the existing active extract data, where at least one field in the Instance, EntryProfile, QualificationsOnEntry, QualificationsAwarded, RAEData, StudentOnModule or Student extract data has a derived value of *NULL ERROR.* The process then selects all the Instance entity records for these EMPLIDs (if an EMPLID has multiple instances and if at least one instance has a *NULL ERROR,* then all the instances are selected).

If you have selected the Validation Errors Only check box for the Include Student Entities, the Create Extract process first deletes any Validation Error staging records where all of the COURSEID, MODID and EMPLID fields are blank. Then, it selects distinct EMPLIDs from the Validation Error staging table where the EMPLID is not blank. The process selects Instance entity records for these EMPLIDs. Finally, the process deletes records from the Validation Error staging table where EMPLID is populated.

Actual Progression Route (ACTPROGROUTE)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	ACTPROGROUTE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK = 1, 3, or 4
- Instance.ENDDATE value exists
- Instance.PROGTYPE = 02, 03, 10, 19, 20 or 21
- Instance.AIMTYPE = 1

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.

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3. Use default.
4. Derive as *NULL ERROR.*

Learning Support Cost (ADDSUPCT)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	ADDSUPCT

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01
- Instance.FUNDMODEL = 25 or 82
- LearnerFAM.LEARNFAMTYPE = HNS

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

The Type of Aim Recorded (AIMTYPE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	AIMTYPE

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Page	Page Element
Plan HESA Data	AIMTYPE
Sub-Plan HESA	AIMTYPE
HESA Instance	AIMTYPE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK = 1, 3, 4, or 5

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Foundation Degree to Degree Bridging Course (BRIDGE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	BRIDGE
Plan HESA Data	BRIDGE
Sub-Plan HESA	BRIDGE

Field Derivation Rule: Derive a value if one of the following conditions is met:

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- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00 AND Related Course.COURSEAIM is not Z99
- Country = Wales, REDUCEDI = 00, AND COURSEAIM does not begin with P, Q, R, S, or X, and is not Z99.

Derivation Steps:

1. Use constant.
2. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

Campus Identifier (CAMPID)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Student Program	Campus
Campus (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Campus)	HESA Campus

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Use constant.
2. Use the mapping to derive the HESA Campus code for the Campus value entered in the Student Program page.
3. Use default.
4. Derive as *NULL ERROR.*

Completion Status (CSTAT)

Return: Student Record

Entity: Instance

Page Used:

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Page	Page Element
HESA Instance	CSTAT

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Provider Transfer From Date (COLFROMDATE)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	COLFROMDATE

Field Derivation Rule: Derive a value if related Course.COURSEAIM = D00, D01, L00, or L80.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive as *NULL.*

Provider Transferred From (COLFROMPROV)

Return: Student Record

Entity: Instance

Page Used:

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Page	Page Element
HESA Instance	COLFROMPROV

Field Derivation Rule: Derive a value if related Course.COURSEAIM = D00, D01, L00, or L80.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive as *NULL*.

Provider Transfer to Date (COLTODATE)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	COLTODATE

Field Derivation Rule:

Derive a value if the following conditions are met:

- Instance.RSEND = 12
- Related Course.COURSEAIM = D00, D01, L00, or L80

Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive as *ENDDATE*.

Provider Transferred To (COLTOPROV)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	COLTOPROV

Field Derivation Rule:

Derive a value if the following conditions are met:

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- Instance.RSEND = 12
- Related Course.COURSEAIM = D00, D01, L00, or L80

Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive as *NULL*.

Start Date of Instance (COMDATE)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	Start Date of Instance Effective Date

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive as the Start Date of Instance from the HESA Instance page.
2. If there is a Research Candidate record for the instance:
   a. Select the Begin Date (SSR_RS_BEGIN_DT) from the most recent active Consumption record where the effective date is on or before the reporting period end date.
   b. Derive the Begin Date formatted to YYYY-MM-DD.
   c. Match the Research Candidate record (SSR_RS_CAND_HDR) to the instance on EMPLID, Institution, Career and Career Number to find the Research Candidate Number (SSR_RS_CANDIT_NBR). If multiple records are found, the record with the highest candidate number is selected.
   d. Associate consumption records (SSR_RS_CONSMPTN) with the Research Candidate record by EMPLID, Institution and Research Candidate Number.

   The calculated value is stored in the HESA Instance Data record.
3. Use the following process to calculate the earliest class start date for enrolled classes related to the Instance being reported. This selection is similar to that done for StudentOnModule except that it is not restricted to classes overlapping the reporting period and considers enrollments for linked careers.
   a. Select all activated terms for the student career of the Instance.
   b. From each activated term, select classes that satisfy the following conditions:

      – Status = *Enrolled*

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– Units Taken value is greater than zero.

– Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the Extract check box selected on the HESA Configuration page.

– Repeat Code value does not exist or does not match a value defined in the Repeat Code Exclusion region with the Extract check box selected on the HESA Configuration page.

– If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then apply a further filter to the class enrollments. In such a case, select the class only if the program value of the enrollment record is does not exist or matches one of the program values in the Student Program records for that career and career number.

c. If the Instance has been linked to a prior student career using the Linked Career and Linked Career Number fields in the HESA Instance record, then also consider classes for the previous career.

d. Derive the earliest Class Start Date from all the selected classes as COMDATE.

4. The earliest Effective Date of the HESA Instance records.

For steps 2 and 3, the system stores the derived date as the Start Date of Instance value in the HESA Instance record.

Course Identifier (COURSEID)

Return: Student Record

Entity: Instance

Pages Used: None

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. If the student's subplan is reported in the Course extract, derive from the student's subplan.
2. Derive from the student's plan.

Destination (DESTIN)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	DESTIN

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Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01
- Course.COURSEAIM begins with P, Q, R, S or X.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Destination of Outward Credit Mobile Students (DESTOCM)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program Offering/Year HESA	DESTOCM, DESTOCM2, DESTOCM3 (Program Year HESA Data group box)
Plan Offering/Year HESA	DESTOCM, DESTOCM2, DESTOCM3 (Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	DESTOCM, DESTOCM2, DESTOCM3 (Sub-Plan Year Data group box)
HESA Instance	DESTOCM, DESTOCM2, DESTOCM3

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England, Wales, or Northern Ireland
- Instance.REDUCEDI = 00
- (Instance.EXCHANGE = 7, B, C, D, or E) or (Instance.LOCSDY = F, G or S)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

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1. Use constant to create a single DESTOCM field.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
4. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
5. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
6. Use default to create a single DESTOCM field.
7. Derive a single DESTOCM field as *NULL ERROR.*

Note: The system can derive up to three values. Each of the values is included as a separate DESTOCM field in the XML file.

Department of Health Funding Body (DHFUND)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	DHFUND
Plan HESA Data	DHFUND
Sub-Plan HESA	DHFUND
HESA Instance	DHFUND

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Related Course.MSFUND = 37 or 38

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.

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4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Regulatory Body Reference Number (DHREGREF)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00 or 01
- Related Course.REGBODY = 06 or 07 or is in the range 40 to 55 inclusive or is in the range 60 to 65 inclusive
- Related Course.COURSEAIM = M16, M26, M76, M86, H16, H62, H76, I16, I76, J26 or J76

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for DHREGREF in the HESA Types page.
2. Use default.
3. Derive as *NULL ERROR.*

You can define a default of *99999999* for this field.

Disabled Student Allowance (DISALL)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	DISALL

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Page	Page Element
Impairment AUS (Campus Community > Personal Information > Health Information > Impairment AUS)	Support Services Request
Disability (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Disability)	HESA Disability Allowance

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland, Instance.REDUCEDI = 00 AND Student.DISABLE = 08 to 96 inclusive.
- Country = Wales, Instance.REDUCEDI = 00, Student.DISABLE = 08 to 96 inclusive, AND Course.COURSEAIM does not begin with P, Q, R, S or X.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If the student has a Support Services Request value defined on the Impairment AUS page, use the mapped HESA Disability Allowance code from the Disability page.
4. Use default.
5. Derive as *NULL ERROR.*

Note: The system derives Student.DISABLE before creating the Student entity in order to derive the Student.DISALL field.

Disadvantage Uplift Factor (DISUPFAC)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
HESA Instance	DISUPFAC

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4

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- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Distance Learning SLN (DISTLEARNSLN)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	DISTLEARNSLN
Plan HESA Data	DISTLEARNSLN
Sub-Plan HESA	DISTLEARNSLN
HESA Instance	DISTLEARNSLN

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK = 1 or 3
- Instance.AIMTYPE = 2, 3 or 4

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.

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5. Derive from the Program HESA Data page.
6. Use default.
7. If Instance.FUNDMODEL = 21 or 22, derive as *NULL ERROR.*
8. Do not derive a value and leave the field blank.

Eligibility for Disadvantaged Uplift (ELIDISUP)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	ELIDISUP

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Eligibility for Enhanced Funding (ELIGENFD)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	ELIGENFD

Field Derivation Rule: Derive only if the Include FE check box is selected.

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Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Aiming for an Equivalent or Lower Qualification (ELQ)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	ELQ

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FEEELIG = 1
- Instance.FESTUMK = 2 or 3
- Related Course.COURSEAIM begins E, M, H, I, J or C

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR.*

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Employer Role (EMPROLE)

Return: Student Record

Entity: Instance

Page Used:

Page	*Page Element*
HESA Instance	EMPROLE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Do not derive a value and leave the field blank.

End Date of Instance (ENDDATE)

Return: Student Record

Entity: Instance

Pages Used:

Page	*Page Element*
Student Program	Program Action Action Reason Effective Date
HESA Instance	ENDDATE
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: Include for all Instance entities.

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Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive the effective date of the record formatted to YYYY-MM-DD if the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page and, either Instance.INTERCALATE is not *01*, or the mapped HESA RSNEND value is not *01*.
3. Derive as null.

Highest Grade GCSE English (ENGGRADE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	ENGGRADE

Field Derivation Rule: Derive a value if all the following conditions are met.

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01
- Instance.FUNDMODEL = 25 or 82

Derivation Steps:

1. Derive from the Further Education page.
2. Derive as *NONE*.

ITT Entry Route (ENTRYRTE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	ENTRYRTE
Plan HESA Data	ENTRYRTE

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Page	Page Element
Sub-Plan HESA	ENTRYRTE
HESA Instance	ENTRYRTE

Bundle 52. Removed TTCID = Q from the required coverage

Field Derivation Rule: Derive a value if all the following conditions are met.

- Country = England
- Instance.REDUCEDI = 00, 01, or 04
- Related Course.TTCID = 1

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance page.
3. If Instance.COURSEID is based on a sub-plan, derive value from the Sub-Plan HESA page.
4. Derive value from Plan HESA Data page.
5. Derive value from Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

Exchange Programmes (EXCHANGE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	EXCHANGE
Program Offering/Year HESA	EXCHANGE (Program Year HESA Data group box)
Plan HESA Data	EXCHANGE
Plan Offering/Year HESA	EXCHANGE (Plan Year HESA Data group box)
Sub-Plan HESA	EXCHANGE
Sub-Plan Offering/Year HESA	EXCHANGE (Sub-Plan Year HESA Data group box)

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Page	Page Element
HESA Instance	EXCHANGE
HESA Instance	Year of Program

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00, 03 or 09 AND Instance.FESTUMK is not 5
- Country = Wales, Instance.REDUCEDI = 00, 03 or 09 AND Instance.FESTUMK is not 5 AND Course.COURSEAIM does not begin with P, Q, R, S or X.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Fee Eligibility (FEEELIG)

Return: Student Record

Entity: Instance

Pages Used:

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Page	***Page Element***
Residency Official 1 (Campus Community, Personal Information (Student), Identification (Student), Residency Data, Residency Official 1)	Residency
Program HESA Data	FEEELIG
Program Offering/Year HESA	FEEELIG (Program Offering HESA Data group box)
Plan HESA Data	FEEELIG
Plan Offering/Year HESA	FEEELIG (Plan Offering HESA Data group box)
Sub-Plan HESA	FEEELIG
Sub-Plan Offering/Year HESA	FEEELIG (Sub-Plan Offering HESA Data group box)
HESA Instance	FEEELIG
Fee Eligibility (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Fee Eligibility)	HESA Fee Eligibility

Field Derivation Rule: Derive a value if the following conditions are met.

- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK is not 5

Bundle 52. Updated steps 4 and 6

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Select the residency records for the EMPLID, institution, and academic career combination for the most recent effective term that starts on or before the end of the reporting period. Use the HESA Fee Eligibility code mapped to the selected residency value. If the mapping does not exist, log an error message and skip to the next step.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
5. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
6. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
7. Derive from the Plan HESA Data page.
8. Derive from the Program Offering/Year HESA page for the academic load of the student instance.

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9. Derive from the Program HESA Data page.
10. Use default.
11. Derive as *NULL ERROR.*

Fee Regime Indicator (FEEREGIME)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	FEEREGIME

Field Derivation Rule: Derive a value if one of the following sets of conditions is met. Otherwise, do not derive a value and leave the field blank.

Set	***Conditions***
England Postgraduate	Bundle 52. Coverage changed for England to PROGTYPE and FUNDMODEL condition *and* instead of *or*. • Country = England, and • Related Course.COURSEAIM begins with E or M excluding M22, M26 or M28, and • Related Course.TTCID is *not* Q, and • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 4 or G, and • (Instance.MODE = 01, 02, 23, 24, 25, 31, 73, or 74) or (Instance.MODE = 43 or 44 and Instance.MCDATE is in the reporting period) • Instance.PROGTYPE is not 25 and • Instance.FUNDMODEL is not 36

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Set	***Conditions***
England Undergraduate	Bundle 52. Coverage changed for England to PROGTYPE and FUNDMODEL condition *and* instead of *or*. • Country = England, and • Related Course.COURSEAIM begins with H, I, J, C or is M22, M26 or M28, and • Related Course.TTCID is not Q, and • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 4 or G, and • Instance.MODE = 01, 02, 23, 24, 25, 31, 43, or 44 and • Instance.PROGTYPE is not 25 and • Instance.FUNDMODEL is not 36
Northern Ireland Postgraduate	• Country = Northern Ireland, and • Related Course.COURSEAIM is M71, M73, or M88 • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 4 or G, and • Instance.SSN value does not exist, and • (Instance.MODE = 01, 02, 23, 24, or 25) or (Instance.MODE = 43 and Instance.MCDATE is in the reporting period)
Northern Ireland Undergraduate	• Country = Northern Ireland, and • Related Course.COURSEAIM begins with H, I, J, C or is M22, M26 or M28 • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 4 or G, and • Instance.SSN value does not exist, and • Instance.MODE = 01, 02, 23, 24, 25, or 43

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Set	***Conditions***
Scotland	• Country = Scotland, and • Instance.REDUCEDI = 00 or 01, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 4, G, Y or Z, and • Instance.MODE = 01, 02, 23, 24, or 25, and • Related Course.COURSEAIM is C20, C30, H00, H11, H16, H18, H22, H23, H50, H88, I00, I11, I16, J20, J26, J30, M22, M26, M28, M71, M73, or M88
Wales	• Country = Wales, and • Instance.REDUCEDI = 00, and • Instance.FEEELIG = 1 or 3, and • Instance.EXCHANGE is not 4 or G, and • Instance.SSN value does not exist, and • Instance.MODE = 01, 02, 23, 24, 25, or 43, and • Related Course.COURSEAIM begins H, I, J, C or is M22, M26, M28, M71, M73 or M88

Derivation Steps:

1. Derive from the HESA Instance page.
2. If Instance.COMDATE is before *01-SEP-2012*, derive as *10*.
3. If Instance.COMDATE is on or after *01-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 way as EntryProfile.DOMICILE and is derived even if an EntryProfile is not being included in the extract (that is, for new and continuing students).

   The check on European Union includes countries where the EU Member State check box 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-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*.
5. If Instance.COMDATE is on or after *01-SEP-2012,* derive as *20*.

Outcome (FEOUTCOME)

Return: Student Record

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Entity: Instance

Page Used:

Page	Page Element
HESA Instance	FEOUTCOME

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK = 1, 3, 4, or 5

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

FE Student Marker (FESTUMK)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	FESTUMK
Plan HESA Data	FESTUMK
Sub-Plan HESA	FESTUMK
HESA Instance	FESTUMK
HESA Returns	Include FE

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Wales

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- Instance.REDUCEDI is 00, 01, 03 or 04

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive as *2* if Include FE check box is not selected on the HESA Returns page.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Other Funding Adjustment (FUNDADJOTH)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	FUNDADJOTH

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Either (Instance.AIMTYPE = 1, 3, or 4 and Instance.FUNDMODEL = 35 or 81) OR (Instance.AIMTYPE = 4 and LearningDeliveryFAM.LEARNDELFAMTYPE = ADL)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

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Funding Adjustment for Prior Learning (FUNDADJPRIOR)

Return: Student Record

Entity: Instance

Page Used:

Page	*Page Element*
HESA Instance	FUNDADJPRIOR

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Either (Instance.AIMTYPE = 1, 3, or 4 and Instance.FUNDMODEL = 35 or 81) OR (Instance.AIMTYPE = 4 and LearningDeliveryFAM.LEARNDELFAMTYPE = ADL)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Franchise Partner (FRANPART)

Return: Student Record

Entity: Instance

Pages Used:

Page	*Page Element*
Program HESA Data	FRANPART
Plan HESA Data	FRANPART
Sub-Plan HESA	FRANPART
HESA Instance	FRANPART

Field Derivation Rule: Derive only if the Include FE check box is selected.

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Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Franchised Out Arrangements (FROUTARR)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	FROUTARR
Plan HESA Data	FROUTARR
Sub-Plan HESA	FROUTARR
HESA Instance	FROUTARR

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

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Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

FTE Method (FTEMETHOD)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	FTEMETHOD
Program Offering/Year HESA	FTEMETHOD (Program Offering HESA Data group box)
Plan HESA Data	FTEMETHOD
Plan Offering/Year HESA	FTEMETHOD (Plan Offering HESA Data group box)
Sub-Plan HESA	FTEMETHOD
Sub-Plan Offering/Year HESA	FTEMETHOD (Sub-Plan Offering HESA Data group box)
HESA Instance	FTEMETHOD

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Instance.REDUCEDI = 00, 01, or 03

Do not derive a value and leave the field blank, if the conditions are not met.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.

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3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Fundability Code (FUNDCODE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	FUNDCODE
Plan HESA Data	FUNDCODE
Sub-Plan HESA	FUNDCODE
HESA Instance	FUNDCODE

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country is Northern Ireland, Scotland or Wales, and Instance.REDUCEDI = 00 or 01
- Country is England, and Instance.REDUCEDI = 00 or 01, and Instance.FESTUMK is not 1 or 4

Do not derive a value and leave the field blank, if the condition is not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.

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6. Use default.
7. Derive as *NULL ERROR.*

Completion of Year of Instance (FUNDCOMP)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	FUNDCOMP

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England, Wales, or Northern Ireland
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK is not 5

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Level Applicable to Funding Council HESES (FUNDLEV)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	FUNDLEV
Program Offering/Year HESA	FUNDLEV (Program Year HESA Data group box)
Plan HESA Data	FUNDLEV
Plan Offering/Year HESA	FUNDLEV (Plan Year HESA Data group box)

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Page	Page Element
Sub-Plan HESA	FUNDLEV
Sub-Plan Offering/Year HESA	FUNDLEV (Sub-Plan Year HESA Data group box)
HESA Instance	FUNDLEV

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK is not 5

Do not derive a value and leave the field blank, if the conditions are not met.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Funding Model (FUNDMODEL)

Return: Student Record

Entity: Instance

Pages Used:

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Page	Page Element
Program HESA Data	FUNDMODEL
Plan HESA Data	FUNDMODEL
Sub-Plan HESA	FUNDMODEL
HESA Instance	FUNDMODEL

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK = 1, 3, 4, or 5

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Framework Code (FWORKCODE)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	FWORKCODE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England

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- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.PROGTYPE = 02, 03, 20, 21, 22 or 23

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Guided Learning Hours (GLHRS)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	GLHRS
Program Offering/Year HESA	GLHRS (Program Offering HESA Data group box)
Plan HESA Data	GLHRS
Plan Offering/Year HESA	GLHRS (Plan Offering HESA Data group box)
Sub-Plan HESA	GLHRS
Sub-Plan Offering/Year HESA	GLHRS (Sub-Plan Offering HESA Data group box)
HESA Instance	GLHRS

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England or Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

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1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Government Initiatives (GOVINIT)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	GOVINIT
Plan HESA Data	GOVINIT
Sub-Plan HESA	GOVINIT
HESA Instance	GOVINIT

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.

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3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Gross Fee (GROSSFEE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
HESA Returns	Account Type Tuition
Fees After Calculation (Student Financials, Tuition and Fees, Review Fees After Calculation)	Amount
Program HESA Data	GROSSFEE
Program Offering/Year HESA	GROSSFEE (Program Offering HESA Data group box)
Plan HESA Data	GROSSFEE
Plan Offering/Year HESA	GROSSFEE (Plan Offering HESA Data group box)
Sub-Plan HESA	GROSSFEE
Sub-Plan Offering/Year HESA	GROSSFEE (Sub-Plan Offering HESA Data group box)
HESA Instance	GROSSFEE

Field Derivation Rule: if Instance.FEEREGIME = 20 derive a value. Otherwise, do not derive a value and leave the field blank.

Do not derive a value and leave the field blank, if the conditions are not met.

Note: FEEREGIME is derived depending on FEEELIG, EXCHANGE, MODE and COURSEAIM values and for Scotland, Northern Ireland and Wales only, if SSN value does not exist.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Derive from the HESA Instance page.

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2. Derive as total of all the tuition fee charges for the student career for terms that start within the reporting period. Fee records where the Item Type Code is *Charge* and the Account Type is one of those defined with the Tuition check box selected on the HESA Returns page. The derived value is rounded to the nearest pound.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Do not derive a value and leave the field blank.

Implied Rate of Council Partial Funding (IMPRATE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	IMPRATE
Program Offering/Year HESA	IMPRATE (Program Offering HESA Data group box)
Plan HESA Data	IMPRATE
Plan Offering/Year HESA	IMPRATE (Plan Offering HESA Data group box)
Sub-Plan HESA	IMPRATE
Sub-Plan Offering/Year HESA	IMPRATE (Sub-Plan Offering HESA Data group box)
HESA Instance	IMPRATE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4

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- Instance.REDUCEDI = 00
- Related Course.MSFUND = 86, 87, 88, AA, AB, AC, or AD

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Institution's Own Campus Identifier (INSTCAMP)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Student Program	Campus
Campus (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Campus)	HESA Campus

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Use constant.
2. Use the mapping to derive the HESA Campus code for the Campus value entered in the Student Program page.
3. Use default.

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4. If Country = Wales and Course.COURSEAIM = X41, X42, X43, X44, X45 or X46 then derive as *NULL ERROR*.
5. Do not derive a value and leave the field blank.

Initiatives (INITIATIVES)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	INITIATIVES, INITIATIVES2
Plan HESA Data	INITIATIVES, INITIATIVES2
Sub-Plan HESA	INITIATIVES, INITIATIVES2
HESA Instance	INITIATIVES, INITIATIVES2

Field Derivation Rule: Include for all entities

Do not derive a value and leave the field blank, if the condition is not met.

Derivation Steps:

1. Derive from the HESA Instance page.
2. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Do not derive a value and leave the field blank.

Intended Level of MPhil/PhD Studies (INTENTLEV)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	INTENTLEV
Plan HESA Data	INTENTLEV
Sub-Plan HESA	INTENTLEV

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Page	Page Element
HESA Instance	INTENTLEV

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Related Course.COURSEAIM = L99
- Instance.REDUCEDI = 00, 01, 03 or 04

If the conditions are not met, do not derive a value and leave the field blank.

Derivation steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a sub-plan, derive value from Sub-Plan HESA.
4. Derive value from Plan HESA Data.
5. Derive value from Program HESA Data.
6. Use default.
7. Derive as null.

Intercalation (INTERCALATE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	INTERCALATE
Program Offering/Year HESA	INTERCALATE (Program Year HESA Data group box)
Plan HESA Data	INTERCALATE
Plan Offering/Year HESA	INTERCALATE (Plan Year HESA Data group box)
Sub-Plan HESA	INTERCALATE
Sub-Plan Offering/Year HESA	INTERCALATE (Sub-Plan Year HESA Data group box)
HESA Instance	INTERCALATE

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Field Derivation Rule: If Instance.REDUCEDI = 00, 01 or 03 derive a value. Otherwise, do not derive a value and leave the field blank.

Bundle 52. Update steps 2 and 4

Derivation Steps:

1. Derive from the HESA Instance page.
2. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
5. Derive from the Plan HESA Data page.
6. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
7. Derive from the Program HESA Data page.
8. Use default.
9. Do not derive a value and leave the field blank.

ITT Qualification Aim (ITTAIM)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	ITTAIM
Plan HESA Data	ITTAIM
Sub-Plan HESA	ITTAIM

Bundle 52. Removed TTCID = Q from the coverage

Field Derivation Rule: Derive a value if all the conditions are met.

- Country = England
- Instance.REDUCEDI = 00, 01 or 04

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- Related Course.TTCID = 1

Derivation Steps:

1. Use constant.
2. If a sub-plan is reported, derive value from Sub-Plan HESA page.
3. Derive value from Plan HESA Data page.
4. Derive value from Program HESA Data page.
5. Use default.
6. Derive as NULL ERROR.

ITT Phase/Scope (ITTPHSC)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	ITTPHSC
Plan HESA Data	ITTPHSC
Sub-Plan HESA	ITTPHSC
HESA Instance	ITTPHSC

Bundle 52. Removed TTCID = 8, F, G and Q from the coverage

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Wales
- Related Course.TTCID = 1 or 2
- Related Course.REDUCEDC = 00, 01, 04 or 07

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.

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5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

ITT Schemes (ITTSCHMS)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	ITTSCHMS
Plan HESA Data	ITTSCHMS
Sub-Plan HESA	ITTSCHMS
HESA Instance	ITTSCHMS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00, 01, or 04
- Related Course.TTCID = 1, 2, 8, or G

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Learning Difficulty (LEARNDIF)

Return: Student Record

Entity: Instance

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Page Used:

Page	Page Element
HESA Instance	LEARNDIF

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Learning Planned End Date (LEARNPLANENDDATE)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	LEARNPLANENDDATE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK = 1, 3, 4 or 5

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.

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2. Derive from the HESA Instance page (in YYYY-MM-DD format).
3. End Date of the Expected Graduation Term defined for the Student Program, converted to YYYY-MM-DD format
4. Use default.
5. Derive as *NULL ERROR.*

FTE in Year A (LOADYRA)

Return: Student Record

Entity: Instance

Pages Used: None

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.INSTAPP = 1
- Instance.TYPEYR = 2, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Course.COURSEAIM does not begin D, L, P, Q, R, S or X

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Step:

Note: For this release, this field is derived as *NULL ERROR.*

FTE in Year B (LOADYRB)

Return: Student Record

Entity: Instance

Pages Used: None

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.INSTAPP = 1
- Instance.TYPEYR = 2, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Course.COURSEAIM does not begin D, L, P, Q, R, S or X

Do not derive a value and leave the field blank, if the conditions are not met.

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Derivation Step:

Note: For this release, this field is derived as *NULL ERROR.*

Location of Study (LOCSDY)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	LOCSDY
Program Offering/Year HESA	LOCSDY (Program Year HESA Data group box)
Plan HESA Data	LOCSDY
Plan Offering/Year HESA	LOCSDY (Plan Year HESA Data group box)
Sub-Plan HESA	LOCSDY
Sub-Plan Offering/Year HESA	LOCSDY (Sub-Plan Year HESA Data group box)
HESA Instance	LOCSDY
HESA Instance	Year of Program

Field Derivation Rule: If Instance.REDUCEDI = 00, 01 or 09 derive a value. Otherwise, do not derive a value and leave the field blank.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
6. Derive from the Plan HESA Data page.

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7. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Math Grade for GCSE (MATHGRADE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	MATHGRADE

Field Derivation Rule: Derive a value if all the following conditions are met.

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01
- Instance.FUNDMODEL = 25 or 82

Derivation Steps:

1. Derive value from the Further Education page.
2. Derive as *NONE*.

Change of Mode Date (MCDATE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Student Program	Program Action Action Reason
HESA Instance	MCDATE

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Page	Page Element
HESA Action Reasons	HESA Mode Direction (Change of Mode Mapping group box)

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM begins with D, E, L, or M (excluding M22, M26 or M28)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If MODE derivation step = 1 (that is derived from HESA Instance page), then derive MCDATE from HESA Instance page.
2. If MODE derivation step = 2 and the most recent record was selected to derive MODE, select any other earlier change of mode from the Student Program records where effective end date is within the reporting period.

   For each record, determine from the Mode Direction mapping whether the MODE changed from Active to Inactive or vice versa.

   If any one of the following three conditions is met, derive MCDATE as the effective date of the record that was used to derive MODE, formatted to YYYY-MM-DD:

   - The earliest Mode Direction From = *Active* and the latest Mode Direction To = *Inactive.*
   - The earliest Mode Direction From = *Inactive* and the latest Mode Direction To = *Active.*
   - The earliest Mode Direction From = *Inactive,* the latest Mode Direction To = *Inactive,* and a minimum of one of the selected records for the reporting period has a Mode Direction To = Active (that is, student was active at some point).

3. Derive as null.

Mode of Study (MODE)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program Offering/Year HESA	MODE (Program Year HESA Data group box)
Program Offering/Year HESA	MODE (Program Offering HESA Data group box)

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Page	***Page Element***
Program HESA Data	MODE (Program HESA Data group box)
Plan Offering/Year HESA	MODE (Plan Year HESA Data group box)
Plan Offering/Year HESA	MODE (Plan Offering HESA Data group box)
Plan HESA Data	MODE (Plan HESA Data group box)
Sub-Plan Offering/Year HESA	MODE (Sub-Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	MODE (Sub-Plan Offering HESA Data group box)
Sub-Plan	MODE (Sub-Plan HESA Data group box)
Student Program	Program Action Action Reason
Student Program	Acad Load
HESA Instance	MODE
HESA Instance	Year of Program
Mode of Study (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Mode of Study)	HESA Mode of Study
HESA Action Reasons	Change of Mode Mapping
Term/Session Table (Set up SACR, Foundation Table, Term Setup, Term/Session Table)	Term
Enrollment Limit (Records and Enrollment, Student Term Information, Term Activate a Student, Enrollment Limit)	Approved Academic Load

Field Derivation Rule: Include for all Instance entities.

Bundle 52. Updated steps 3, 4, 6, and 7

Derivation Steps:

1. Derive from the HESA Instance page.

2. Select the Student Program record that has Program Action/Reason values mapped to a HESA Mode in the HESA Action Reasons page. Derive the mapped HESA mode value. If the derived value is *73* or *74* and the effective date of the record is prior to the reporting period start date, convert *73* to *63* and *74* to *64*.

3. If Instance.COURSEID is based on a subplan and the MODE value from the Sub-Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance is defined, then derive the Sub-Plan Offering/Year HESA MODE value. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

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4. If Instance.COURSEID is based on a subplan and MODE is defined in Sub-Plan Offering HESA Data for the academic load of the student instance, then derive the Sub-Plan Offering HESA Data MODE value. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.

5. If Instance.COURSEID is based on a subplan and MODE is defined in Sub-Plan HESA page, then derive the Sub-Plan HESA MODE value.

6. If the MODE value from the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance is defined, then derive the Plan Offering/Year HESA MODE value. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

7. If the MODE value is defined in Plan Offering HESA Data for the academic load of the student instance, then derive Plan Offering HESA Data MODE value. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.

8. If MODE is defined in Plan HESA Data page, then derive that value.

9. If the MODE value from the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance is defined, then derive the Program Offering/Year HESA MODE value.

10. If the MODE value is defined in Program Offering HESA Data for the academic load of the student instance, then derive the Program Offering HESA Data MODE value.

11. If MODE is defined in Program HESA Data, then derive that value.

12. Map the Approved Academic Load from the most recent activated student term record that overlaps the reporting period to a HESA code value using the HESA Mode mapping. A term is considered to overlap if the begin date or end date falls within the reporting period.

13. Map the Academic Load for the most recent effective-dated record in the Student Program/Plan stack that has an Effective Date on or before the reporting period end date to a HESA code using the HESA Mode mapping.

14. Derive as *NULL ERROR.*

Major Source of Tuition Fees (MSTUFEE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	MSTUFEE
Program Offering/Year HESA	MSTUFEE (Program Offering HESA Data group box)
Plan HESA Data	MSTUFEE

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Page	*Page Element*
Plan Offering/Year HESA	MSTUFEE (Plan Offering HESA Data group box)
Sub-Plan HESA	MSTUFEE
Sub-Plan Offering/Year HESA	MSTUFEE (Sub-Plan Offering HESA Data group box)
HESA Instance	MSTUFEE

Field Derivation Rule: Derive a value if all the conditions are met:

- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK is not 5

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Net Fee (NETFEE)

Return: Student Record

Entity: Instance

Pages Used:

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Page	***Page Element***
HESA Returns	Account Type Waiver
Fees After Calculation (Student Financials, Tuition and Fees, Review Fees After Calculation)	Amount
Program HESA Data	NETFEE
Program Offering/Year HESA	NETFEE (Program Offering HESA Data group box)
Plan HESA Data	NETFEE
Plan Offering/Year HESA	NETFEE (Plan Offering HESA Data group box)
Sub-Plan HESA	NETFEE
Sub-Plan Offering/Year HESA	NETFEE (Sub-Plan Offering HESA Data group box)
HESA Instance	NETFEE

Field Derivation Rule: If Instance.FEEREGIME = 20 derive a value. Otherwise, do not derive a value and leave the field blank.

Do not derive a value and leave the field blank, if the conditions are not met.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Derive from the HESA Instance page.
2. If Instance.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. Fee records where the Item Type Code is *Waiver* and the Account Type is one of those defined with the Waiver check box selected in HESA Returns page. The derived value is then rounded to the nearest pound.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.

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9. Use default.
10. Do not derive a value and leave the field blank,

NHS Employer (NHSEMP)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	NHSEMP
Plan HESA Data	NHSEMP
Sub-Plan HESA	NHSEMP
HESA Instance	NHSEMP

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Related Course.COURSEAIM = M76, H76, I76, or J76

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Reason for Partial and Full Non-payment of Tuition (NONPAY)

Return: Student Record

Entity: Instance

Page Used:

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Page	Page Element
HESA Instance	NONPAY

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00
- Course.MSFUND does not equal 91

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Suspension of Active Studies (NOTACT)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Student Program	Program Action Action Reason
HESA Instance	NOTACT
HESA Action Reasons	Suspension of Active Studies Mapping

Field Derivation Rule: If Instance.RSNEND and Instance.ENDDATE values do not exist, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the HESA Instance page.

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2. If the most recent effective dated Student Program record has Program Action/Reason values mapped to the a HESA Suspension of Studies code on the HESA Action Reasons page, then derive the mapped HESA code value.

3. If Instance.MODE = 73 or 74, derive as *1*.

4. Do not derive a value and leave the field blank.

Note: For correct derivation, ensure that if you have mapped a Program Action/Reason to a MODE of *73* or *74,* map the same Program Action/Reason to a NOTACT value of *1* on the HESA Action Reasons page.

Number of Units to Achieve Full Qualification (NOUNTACH)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	NOUNTACH
Plan HESA Data	NOUNTACH
Sub-Plan HESA	NOUNTACH
HESA Instance	NOUNTACH

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.

2. Derive from the HESA Instance page.

3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.

4. Derive from the Plan HESA Data page.

5. Derive from the Program HESA Data page.

6. Use default.

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7. Derive as *NULL ERROR.*

Student Instance Identifier (NUMHUS)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	Instance Identifier Linked Career Linked Career Number Academic Career Student Career Nbr

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from HESA Instance page as Instance Identifier.
2. Derive from HESA Instance page as Linked Career and Linked Career Number.
3. Derive from HESA Instance page as Academic Career and Student Career Nbr, for example, UGRD1.

Previous Student Instance Identifier (NUMHUSPREV)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	NUMHUSPREV

Field Derivation Rule: Derive a value if related Course.COURSEAIM = D00, D01, L00, or L80.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive as *NULL*.

Number of Units Completed (NUMUNITS)

Return: Student Record

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Entity: Instance

Page Used:

Page	Page Element
HESA Instance	NUMUNITS

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR.*

Institution's Own Instance Identifier (OWNINST)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	OWNINST

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Do not derive a value and leave the field blank.

Subcontracted or Partnership UKPRN (PARTNERUKPRN)

Return: Student Record

Entity: Instance

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Page Used:

Page	***Page Element***
HESA Instance	PARTNERUKPRN

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01 and Instance.AIMTYPE is not 1

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR.*

PhD Submission Date (PHDSUB)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Student Program	Program Action Action Reason
HESA Instance	PHDSUB
HESA Action Reasons	Phd Submission Action Reason Mapping

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00, 01, or 04
- Related Course.COURSEAIM = D00 or D01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance page.

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2. If there is a Research Candidate record for the instance, select the earliest effective dated thesis record where Actual Submission Date has a value and the effective date is on or before the reporting period end date. Derive as the Actual Submission Date formatted to YYYY-MM-DD.

   Note: The process matches the Research Candidate record (SSR_RS_CAND_HDR) to the instance on EMPLID, Institution, Career and Career Number to find the Research Candidate Number (SSR_RS_CANDIT_NBR). The process associates the thesis records (SSR_RS_THESIS) with the Research Candidate record by EMPLID, Institution and Research Candidate Number. It selects the earliest Research Candidate record (by EFFDT, EFFSEQ) that has an Actual Submission Date (SSR_RS_ACT_SUB_DT).

3. Select the earliest Student Program record (exclude records with an effective date greater than the end date of the reporting period) that has Program Action/Reason values mapped in the Phd Submission Action Reason Mapping group box. Derive as the effective date of the record formatted to YYYY-MM-DD.

4. Derive as null.

Planned Employability, Enrichment and Pastoral Hours (PLANEEPHOURS)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	PLANEEPHOURS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Instance.FUNDMODEL = 10, 25, 35, 81, 82 or 99 and Instance.PROGTYPE is not 20, 21, 22, 23 or 25

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR.*

Planned Learning Hours (PLANLEARNHOURS)

Return: Student Record

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Entity: Instance

Page Used:

Page	Page Element
HESA Instance	PLANLEARNHOURS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England AND Instance.FESTUMK = 1, 3, 4, or 5 AND Instance.REDUCEDI = 00 or 01
- Instance.FUNDMODEL = 10, 25, 35, 81, 82 or 99 AND Instance.PROGTYPE is not 20, 21, 22, 23 or 25

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR.*

Good Standing Marker (PROGRESS)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	PROGRESS

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.

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3. Use default.
4. Derive as *NULL ERROR.*

Programme Type (PROGTYPE)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	PROGTYPE
Plan HESA Data	PROGTYPE
Sub-Plan HESA	PROGTYPE
HESA Instance	PROGTYPE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. If Instance.AIMTYPE = 1 or 3, derive as *NULL ERROR.*
8. Do not derive a value and leave the field blank.

Proportion of Funding Remaining (PROPFUNDREMAIN)

Return: Student Record

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Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	PROPFUNDREMAIN
Plan HESA Data	PROPFUNDREMAIN
Sub-Plan HESA	PROPFUNDREMAIN
HESA Instance	PROPFUNDREMAIN

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1 or 3
- Instance.REDUCEDI = 00 or 01
- Instance.AIMTYPE = 2, 3 or 4
- Instance.FUNDMODEL = 21, 22 or 45

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Apprenticeship Pathway (PWAYCODE)

Return: Student Record

Entity: Instance

Pages Used:

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Page	Page Element
Program HESA Data	PWAYCODE
Plan HESA Data	PWAYCODE
Sub-Plan HESA	PWAYCODE
HESA Instance	PWAYCODE

Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Instance.PROGTYPE = 02, 03, 20, 21, 22 or 23

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Qualified Teacher Status (QTS)

Return: Student Record

Entity: Instance

Pages Used:

Page	Page Element
Program HESA Data	QTS
Plan HESA Data	QTS
Sub-Plan HESA	QTS

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Page	Page Element
HESA Instance	QTS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.REDUCEDI = 00, 01, or 04
- Related Course.TTCID = 5

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Research Council Student Identifier (RCSTDID)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00, 01, or 04
- Instance.RCSTDNT is not 99

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If there is a Research Candidate record for the instance, select the value of the CAF attribute defined for RCSTDID in Returns Setup from the most recent active consumption record where the effective date is on or before the reporting period end date.

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2. Select External System ID records for the person with the External ID Type defined for RCSTDID in the HESA Types page.
3. Do not derive a value and leave the field blank.

Research Council Student (RCSTDNT)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	RCSTDNT
Plan HESA Data	RCSTDNT
Sub-Plan HESA	RCSTDNT
HESA Instance	RCSTDNT

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00, 01, or 04
- Related Course.COURSEAIM begins D, E, L, or M (except M22, M26, M28, M71, or M73)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If there is a Research Candidate record for the instance, select the value of the CAF attribute defined for RCSTDNT in Returns Setup from the most recent active consumption record where the effective date is on or before the reporting period end date.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan HESA Data page.
6. Derive from the Program HESA Data page.
7. Use default.
8. Derive as *NULL ERROR.*

Amount of Tuition Fees Received/Expected for the Student (RECFEE)

Return: Student Record

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Entity: Instance

Page Used:

Page	Page Element
HESA Instance	RECFEE

Field Derivation Rule: Derive a value only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.FESTUMK = 1, 3, or 4
- Instance.REDUCEDI = 00 or 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Reduced Instance Return Indicator (REDUCEDI)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	REDUCEDI

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Country = England, Scotland, or Northern Ireland and Instance.STULOAD is *10.0* or less, derive as *01*.
4. If Instance.EXCHANGE is *2, 4, 8, 9*, *A* or *G,* derive as *03.*

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5. If Instance.MODE = *63* or *64,* derive as *04.*
6. Derive as *00.*

Reason for Ending Instance (RSNEND)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Student Program	Program Action Action Reason
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.REDUCEDI = 00, 01, 04, 07, 08 or 09
- Instance.ENDDATE is completed.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive value from the HESA Instance page.
2. If the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page, then derive the mapped HESA code value.
3. Derive as *NULL ERROR.*

Number of Student Associates Scheme Days Completed (SASDAYS)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	SASDAYS

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England

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- Course.REDUCEDC = 06 (SAS) or Course.TTCID = E (SAS)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Student Associates Scheme Placement (SASSCHL)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	SASSCHL

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 06 (SAS) or Course.TTCID = E (SAS)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

School Direct Employing School (SDEMPLOY)

Bundle 52. This is an existing ITT field that is added to the Student return.

Return: Student Record

Entity: Instance

Page Used:

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Page	Page Element
Program HESA Data	SDEMPLOY
Plan HESA Data	SDEMPLOY
Sub-Plan HESA	SDEMPLOY
HESA Instance	SDEMPLOY

Field Derivation Rule: Derive a value if the following conditions are met:

- Instance.ENTRYRTE = 03
- Instance.MODE is not 63 or 64

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance page.
3. If Instance.COURSEID is based on a sub-plan, derive value from the Sub-Plan HESA page.
4. Derive value from Plan HESA Data page.
5. Derive value from Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

School Direct Lead School (SDLEAD)

Bundle 52. This is an existing ITT field that is added to the Student return.

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
Program HESA Data	SDLEAD
Plan HESA Data	SDLEAD
Sub-Plan HESA	SDLEAD
HESA Instance	SDLEAD

Field Derivation Rule: Derive a value if the following conditions are met:

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- Instance.ENTRYRTE = 02 or 03
- Instance.MODE is not 63 or 64

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance page.
3. If Instance.COURSEID is based on a sub-plan, derive value from the Sub-Plan HESA page.
4. Derive value from Plan HESA Data page.
5. Derive value from Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

Subject Knowledge Enhancement Institution (SKEITT)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	SKEITT

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England
- Course.REDUCEDC = 07 (SKE) or Course.TTCID = F (SKE)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Special Fee Indicator (SPECFEE)

Return: Student Record

Entity: Instance

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Pages Used:

Page	***Page Element***
Program Offering/Year HESA	SPECFEE (Program Year HESA Data group box)
Plan Offering/Year HESA	SPECFEE (Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	SPECFEE (Sub-Plan Year HESA Data group box)
HESA Instance	SPECFEE

Bundle 52. Updated field derivation: added a check on FUNDMODEL

Field Derivation Rule: Derive if one of the following conditions is met:

- Country = Northern Ireland or Scotland AND Instance.REDUCEDI = 00 AND Instance.PROGTYPE is not 25 AND Instance.FUNDMODEL is not 36
- Instance.REDUCEDI = 00 AND Country = England or Wales AND Instance.PROGTYPE is not 25 AND Instance.FUNDMODEL is not 36 AND Course.COURSEAIM does not begin with P, Q, R, S or X

Bundle 52. Updated steps 3–4.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
4. Derive from the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
5. Derive from the Program Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance.
6. Use default.
7. Derive as *NULL ERROR.*

Expected Length of Study (SPLENGTH)

Return: Student Record

Entity: Instance

Pages Used:

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Page	*Page Element*
Program HESA Data	SPLENGTH
Program Offering/Year HESA	SPLENGTH (Program Offering HESA Data group box)
Plan HESA Data	SPLENGTH
Plan Offering/Year HESA	SPLENGTH (Plan Offering HESA Data group box)
Sub-Plan HESA	SPLENGTH
Sub-Plan Offering/Year HESA	SPLENGTH (Sub-Plan Offering HESA Data group box)
HESA Instance	SPLENGTH

Field Derivation Rule: Derive a value if the following conditions are met.

- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK is not 5

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as null.

SLDD-Discrete Provision (ST13)

Return: Student Record

Entity: Instance

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Page Used:

Page	Page Element
HESA Instance	ST13

Field Derivation Rule: Derive a value only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = Wales
- Instance.FESTUMK = 1 or 3
- Instance.REDUCEDI = 00

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Student Instance FTE (STULOAD)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	Calculated FTE Report Zero Override FTE

Field Derivation Rule: Derive a value if the following conditions are met.

- Instance.REDUCEDI = 00, 01, or 03
- Instance.FESTUMK is not 5

Derivation Steps:

1. Derive as zero, if the Report Zero check box is selected on the HESA Instance page for the reporting period.
2. Derive as the Override FTE value on the HESA Instance page for the reporting period.

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3. Derive as the Calculated FTE value on the HESA Instance page for the reporting period.
4. Use default.
5. Derive as *NULL ERROR.*

Teacher Reference Number (TREFNO)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
External System ID	External System ID

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England, Scotland, or Wales
- Instance.REDUCEDI = 00 or 01, or 04 or 08
- Related Course.TTCID = 1

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for TREFNO in the HESA Types page.
2. Use default.
3. If Country = England, derive NULL ERROR.
4. Do not derive a value and leave the field blank.

Type of Instance Year (TYPEYR)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	TYPEYR
Program Offering/Year HESA	TYPEYR (Program Year HESA Data group box)
Plan HESA Data	TYPEYR

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Page	***Page Element***
Plan Offering/Year HESA	TYPEYR (Plan Year HESA Data group box)
Sub-Plan HESA	TYPEYR
Sub-Plan Offering/Year HESA	TYPEYR (Sub-Plan Year Data group box)
HESA Instance	TYPEYR

Field Derivation Rule: Derive a value if the following conditions are met.

- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK is not 5

Bundle 52. Updated steps 4–7 and 12–15

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Derive as *1* if COMDATE is in the range 01-AUG to 31-DEC (any year) and ENDDATE is in the range 01-JAN to 31-JUL (any year) and RSNEND = 01 or 98.
4. Derive as *1* if Instance.COURSEID is based on a subplan, and a TYPEYR value of *1* is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
5. Derive as *2* if Instance.COURSEID is based on a subplan, a TYPEYR value of *2, 3, 4,* or *5* is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance, and COMDATE is within the reporting period. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
6. Derive as *3* if Instance.COURSEID is based on a subplan, a TYPEYR value of *2, 3, 4,* or *5* is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance, COMDATE is prior to the reporting period, ENDDATE value does not exist or is not within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
7. Derive as *4* if Instance.COURSEID is based on a subplan, a TYPEYR value of *2, 3, 4,* or *5* is defined on the Sub-Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance, COMDATE is prior to the reporting period, ENDDATE is within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
8. Derive as *1* if Instance.COURSEID is based on a subplan and a TYPEYR value of *1* is defined on the Sub-Plan HESA page.

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9. Derive as *2* if Instance.COURSEID is based on a subplan, a TYPEYR value of *2, 3, 4,* or *5* is defined on the Sub-Plan HESA page, and COMDATE is within the reporting period.

10. Derive as *3* if Instance.COURSEID is based on a subplan, a TYPEYR value of *2, 3, 4,* or *5* is defined on the Sub-Plan HESA page, COMDATE is prior to the reporting period, ENDDATE value does not exist or is not within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales.

11. Derive as *4* if Instance.COURSEID is based on a subplan, a TYPEYR value of *2, 3, 4,* or *5* is defined on the Sub-Plan HESA page, COMDATE is prior to the reporting period, ENDDATE is within the reporting period, and and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales..

12. Derive as *1* if a TYPEYR value of *1* is defined on the Plan Offering/Year HESA page for the combination of academic load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

13. Derive as *2* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, and COMDATE is within the reporting period. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

14. Derive as *3* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, ENDDATE value does not exist or is not within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

15. Derive as *4* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, ENDDATE is within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.

16. Derive as *1* if a TYPEYR value of *1* is defined on the Plan HESA Data page.

17. Derive as *2* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Plan HESA Data page, and COMDATE is within the reporting period.

18. Derive as *3* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Plan HESA Data page, COMDATE is prior to the reporting period, ENDDATE value does not exist or is not within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales.

19. Derive as *4* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Plan HESA Data page, COMDATE is prior to the reporting period, ENDDATE is within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales.

20. Derive as *1* if a TYPEYR value of *1* is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance.

21. Derive as *2* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, and COMDATE is within the reporting period.

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22. Derive as *3* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, ENDDATE value does not exist or is not within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales.

23. Derive as *4* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance, COMDATE is prior to the reporting period, ENDDATE is within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales.

24. Derive as *1* if a TYPEYR value of *1* is defined on the Program HESA Data page.

25. Derive as *2* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Program HESA Data page and COMDATE is within the reporting period.

26. Derive as *3* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Program HESA Data page, COMDATE is prior to the reporting period, ENDDATE value does not exist or is not within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales.

27. Derive as *4* if a TYPEYR value of *2, 3, 4,* or *5* is defined on the Program HESA Data page, COMDATE is prior to the reporting period, ENDDATE is within the reporting period, and Country is “England”. Else, derive as *2* if Country is Scotland, Northern Ireland, or Wales..

28. Use default.

29. Derive as *NULL ERROR.*

The derivation logic can use the TYPEYR values of *3, 4,* or *5* set up for year, program, plan, or subplan. However, it is expected that only values *1* (Course academic year contained within the HESA reporting year 1 August - 31 July) or *2* (Course academic year not contained within the HESA reporting year 1 August - 31 July) are relevant because the remaining values of *3, 4,* and *5* apply to the student instance rather than the year as a whole.

The system repeats Steps 3 to 6, depending on the level at which the TYPEYR value is defined in the academic structure.

Units of Length (UNITLGTH)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	UNITLGTH
Program Offering/Year HESA	UNITLGTH (Program Offering HESA Data group box)
Plan HESA Data	UNITLGTH
Plan Offering/Year HESA	UNITLGTH (Plan Offering HESA Data group box)

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Page	Page Element
Sub-Plan HESA	UNITLGTH
Sub-Plan Offering/Year HESA	UNITLGTH (Sub-Plan Offering HESA Data group box)
HESA Instance	UNITLGTH

Field Derivation Rule: Derive a value if the following conditions are met.If or 09, derive a value. Otherwise, do not derive a value and leave the field blank.

- Instance.REDUCEDI = 00 or 01
- Instance.FESTUMK is not 5

Bundle 52. Updated 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session, and Campus are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR.*

Withdrawal Reason (WITHDRAWREASON)

Return: Student Record

Entity: Instance

Page Used:

Page	Page Element
HESA Instance	WITHDRAWNREASON

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Field Derivation Rule: Derive only if the Include FE check box is selected.

Derive a value if the following conditions are met:

- Country = England
- Instance.CSTAT = 3 (withdrawn)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Length of Current Year of Instance (YEARLGTH)

Return: Student Record

Entity: Instance

Pages Used:

Page	***Page Element***
Program HESA Data	YEARLGTH
Program Offering/Year HESA	YEARLGTH (Program Year HESA Data group box)
Plan HESA Data	YEARLGTH
Plan Offering/Year HESA	YEARLGTH (Plan Year HESA Data group box)
Sub-Plan HESA	YEARLGTH
Sub-Plan Offering/Year HESA	YEARLGTH (Sub-Plan Year Data group box)
HESA Instance	YEARLGTH

Field Derivation Rule: Derive a value if one of the the following conditions is met:

- Country = Scotland AND Instance.REDUCEDI = 00.
- Country = Wales, Instance. REDUCEDI= 00 AND Course.COURSEAIM does not begin with P, Q, R, S or X

Do not derive a value and leave the field blank, if the conditions are not met.

Bundle 52. Updated steps 4 and 6

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Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Instance.LOCSDY = *D*, *F* or *T*, derive as null.
4. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
5. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
6. Derive from the Plan Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance. Only records where Offering Start Term, Offering Start Session, Campus, Year Term and Year Session are all blank are considered.
7. Derive from the Plan HESA Data page.
8. Derive from the Program Offering/Year HESA page for the combination of Academic Load and YEARPRG of the student instance.
9. Derive from the Program HESA Data page.
10. Use default.
11. Derive as *NULL ERROR.*

Year of Program (YEARPRG)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	Year of Program

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00 or 01 AND Instance.FESTUMK is not 5
- Country = Wales, Instance.REDUCEDI = 00 or 01 AND Instance.FESTUMK is not 5 AND Course.COURSEAIM does not begin with P, Q, R, S or X

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.

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3. Derive as *NULL ERROR.*

Year of Student on This Instance (YEARSTU)

Return: Student Record

Entity: Instance

Page Used:

Page	***Page Element***
HESA Instance	Year of Student

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England, Northern Ireland, or Scotland AND Instance.REDUCEDI = 00 AND Instance.FESTUMK is not 5
- Country = Wales, Instance.REDUCEDI = 00 or 01 AND Instance.FESTUMK is not 5 AND Course.COURSEAIM does not begin with P, Q, R, S or X

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR.*

Student Record Return: Entry Profile Entity

If you select the Include Student Entities check box on the Create Extract Data page, the Create Extract process creates a Entry Profile entity. The process creates a Entry Profile entity for each Instance entity if either the Instance.COMDATE is within the reporting period or if the Include Entry Profile check box is selected on the Entry Profile page. The process creates a single Entry Profile entity using the same key structure as the Instance record.

Access Programmes (ACCESS)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	ACCESS

Field Derivation Rule: Derive a value if the following conditions are met:

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- Country = Scotland
- EntryProfile.QUALENT3 = X00 or X01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Derive as *NULL ERROR*.

Articulation (ARTICLN)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	ARTICLN

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- Entry Profile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = M22, M26, M28, H00, H11, H16, H18, H22, H23, I00, I11, or I16
- Instance.COMDATE is after 2007-07-31
- Instance.INTERCALATE is not 01

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Derive as *NULL ERROR*.

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Care Leaver / Looked After Status (CARELEAVER)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	CARELEAVER

Field Derivation Rule: Derive a value if one of the following sets of conditions is met. Otherwise, do not derive a value and leave the field blank.

Set	***Conditions***
Set 1	• Country = England, and • Instance.REDUCEDI = 00 or 01 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, M28, M71, M73, or M88, and • Instance.FUNDCODE = 1 or 7 or null, and • Instance.COMDATE is greater than 2013-07-31, and • Instance.EXCHANGE is not 4, G or Z, and • Course.TTCID is not F
Set 2	• Country = England, and • Instance.REDUCEDI = 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, M28, M71, M73, or M88
Set 3	• Country = Scotland, and • Instance.REDUCEDI = 00, 01 or 04, and • Course.COURSEAIM begins with H, I, J or C or is M22, M26, M28 or M88, and • EntryProfile.DOMICILE = XF, XG, XH, XI or XK, and • Instance.COMDATE is greater than 2013-07-31

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Set	*Conditions*
Set 4	• Country = Northern Ireland, and • Instance.REDUCEDI = 00, 01, or 04, and • EntryProfile.DOMICILE = XF, XG, XH, XI or XK • Course.COURSEAIM beings with H, I, J or C or is M22, M26, M28, M71, M73, or M88, and • EntryProfile.UCASAPPID exists or EntryProfile.DOMICILE = XF, XG, XH, XI or XK, and • Instance.COMDATE is greater than 2013-07-31
Set 5	• Country = Wales, and • Course.COURSEAIM beings with H, I, J or C or is M22, M26, M28, M71, M73, or M88, and • EntryProfile.UCASAPPID exists, and • Instance.COMDATE is greater than 2013-07-31

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Derive as *NULL ERROR.*

Domicile (DOMICILE)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	*Page Element*
Residency Self-Report (Campus Community > Personal Information (Student) > Identification (Student) > Residency Data > Residency Self-Report)	State Country
Entry Profile	DOMICILE
Nationality (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Nationality)	HESA Domicile
Area of Permanent Residence (Set Up SACR > Product Related > Recruiting and Admissions > UCAS > Mappings > Area of Permanent Residence)	HESA Code

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Field Derivation Rule: Include for all Entry Profile entities.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Select the Residency Self-Report record with the latest Date Reported before the Instance.COMDATE. If no record is found, then select the record with the earliest Date Reported date on or after Instance.COMDATE.

   If a Residency Self-Report record is found and the Country value is not *GBR,* retrieve the related two-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL). If the mapping to a HESA Domicile exists on the Nationality page for the Campus Solutions country code, use the mapped HESA Domicile value; otherwise, use the COUNTRY_2CHAR value.
3. If the Residency Self-Report record is found, the Country value is *GBR,* and a State value exists, select the country and state values. If a mapping exists on the Area of Permanent Residence page between a HESA country code and the selected country and state values, use the mapped HESA Country code. If no mapping is found, log an error message and derive *XK.*
4. If a Residency Self-Report record is found, the Country value is *GBR,* and a State value does not exist, derive *XK.*
5. Use default.
6. Derive as *NULL ERROR.*

Note that some Campus Solutions country codes are invalid for HESA reporting. Use the Nationality page to map the valid HESA codes with the Campus Solutions country codes.

Marital Status (MARSTAT)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	***Page Element***
Biographical Details (Campus Community > Personal Information (Student) > Add/Update Person > Biographical Details)	Marital Status
Entry Profile	MARSTAT
Marital Status (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Marital Status)	HESA Marital Status

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Northern Ireland
- EntryProfile.DOMICILE = XG (Northern Ireland)

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- Related Instance.REDUCEDI = 00 or 04

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Select the Marital Status value from the Biographical History record. Use the mapping on the Marital Status page to derive the HESA Martial Status code.
3. Derive as *NULL ERROR.*

New Entrant to Higher Education (NEWENT)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	NEWENT

Field Derivation Rule: Derive a value if the following conditions are met:

- Related Instance.REDUCEDI = 00
- Related Course.COURSEAIM begins with D, E, L, M, H, I, J, or C

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Do not derive a value and leave the field blank.

Dependents on Entry (NIDEPEND)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	NIDEPEND

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Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Northern Ireland
- EntryProfile.DOMICILE = XG (Northern Ireland)
- Related Instance.REDUCEDI = 00 or 04

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Derive as *NULL ERROR.*

Parental Education (PARED)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	PARED

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Course.COURSEAIM = M22, M26, M28, H00, H11, H16, H18, H22, H23, I00, I11, I16, J10, J16, J20, J26, J30, C20, or C30
- Related Instance.REDUCEDI = 00 or 04
- Instance.COMDATE is after 2007-07-31
- Instance.INTERCALATE is not 01
- If Country = Northern Ireland or Wales, then EntryProfile.UCASAPPID value should exist

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.

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4. Derive as *NULL ERROR.*

PGCE Class of Undergraduate Degree (PGCECLSS)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	PGCECLSS

Field Derivation Rule: Derive a value if the following conditions are met:

- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = M71, M73, or H71

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Derive as *NULL ERROR.*

PGCE Subject of Undergraduate Degree (PGCESBJ)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	PGCESBJ PGCESBJ2 PGCESBJ3

Field Derivation Rule: Derive a value if the following conditions are met:

- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM = M71, M73, or H71

Do not derive a value and leave the field blank, if the conditions are not met.

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Derivation Steps:

1. Use constant to create a single PGCESBJ field.
2. Derive from the Entry Profile page.
3. Use default to create a single PGCESBJ field.
4. Derive a single PGCESBJ field as *NULL ERROR*.

Note: The system can derive up to three values. Each of the values is included as a separate PGCESBJ field in the XML file.

Postcode (POSTCODE)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	***Page Element***
Addresses (Campus Community > Personal Information (Student) > Biographical (Student) > Addresses/Phones > Addresses)	Postal
Entry Profile	POSTCODE

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Instance.REDUCEDI = 00, 01, 04, 07 or 08

Do not derive a value and leave the field blank, if the conditions are not metPREVINST.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Select the address record with the country code of GBR whose effective date is most recent and falls prior to Instance.COMDATE. The record must have an address type that matches the address type mapped with POSTCODE in the HESA Types page. Derive the post code from this 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 (that is, 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.

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The following country codes are considered as UK-related for the purposes of this derivation: GBR (United Kingdom), ENG (England), XF (England), NIR (Northern Ireland), XG (Northern Ireland), SCT (Scotland), XH (Scotland), WAL (Wales), 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.

For steps 1 and 2, the system validates that the derived post code value is in the correct format.

Last School Attended (PREVINST)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	PREVINST

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XF, XG, XH, XI, XK, XL, GG, JE, or IM
- Related Instance.REDUCEDI = 00 or 04
- Related Instance.INTERCALATE is not 01
- Related Course.COURSEAIM = M22, M26, M28, H00, H11, H12, H16, H18, H22, H23, I00, I11, I12, I16, I73, J10, J16, J20, J26, J30, C20, or C30

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Use default.
3. Derive as *NULL ERROR.*

Highest Qualification On Entry (QUALENT3)

Return: Student Record

Entity: Entry Profile

Page Used:

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Page	Page Element
Entry Profile	QUALENT3

Field Derivation Rule:

Derive a value if Instance.REDUCEDI = 00, 01, or 04.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Use default.
3. Derive as *NULL ERROR.*

Religion (RELIGION)

Return: Student Record

Entity: Entry Profile

Pages Used:

Page	Page Element
Religious Preference (Campus Community > Personal Information (Student) > Biographical (Student) > Personal Attributes > Religious Preference)	Religious Preference
Entry Profile	RELIGION
Religion (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Religion)	HESA Religion

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Northern Ireland
- EntryProfile.DOMICILE = XG (Northern Ireland)
- Related Instance.REDUCEDI = 00 or 04

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Select the religious preference from the personal information record. Use the mapping on the Religion page to derive the HESA Religion code.

   If the HESA religion code mapping does not exist, log an error message and skip to the next step.

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3. Use default.
4. Derive as *NULL ERROR.*

Socio-Economic Classification (SEC)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	SEC

Field Derivation Rule: Derive a value if the following conditions are met:

- A value for EntryProfile.UCASAPPID exists.
- EntryProfile.DOMICILE is XF, XG, XH, XI, XK, XL, GG, JE or IM
- Related Course.COURSEAIM begins with H, I, J, or C or is M22, M26 or M28.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Use default.
3. Derive as *NULL ERROR.*

Occupation Code (SOC2010)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Entry Profile	SOC2010

Field Derivation Rule: Derive a value if the following conditions are met:

- A value for EntryProfile.UCASAPPID exists.
- EntryProfile.DOMICILE is XF, XG, XH, XI, XK, XL, GG, JE or IM
- Related Course.COURSEAIM begins with H, I, J, or C or is M22, M26 or M28.

Do not derive a value and leave the field blank, if the conditions are not met.

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Derivation Steps:

1. Derive from the Entry Profile page.
2. Use default.
3. Derive as *NULL ERROR.*

UCAS Application Number (UCASAPPID)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	***Page Element***
Application Data (Student Admissions > Application Maintenance > Maintain Applications > Application Data)	External Application Nbr
Entry Profile	UCASAPPID

Field Derivation Rule: Include for all Entry Profile entities.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Use the Student Program record of the instance to find the admission application number (ADM_APPL_NBR). Use this admission application number to find the Admissions Data record (PS_ADM_APPL_DATA). Then, from the Application Data page for this record, find the External Application Number. The External Application Number is used to record the UCAS Application Number or Application Code plus Choice Number for UCAS applications.

   If External Application Number exists and is a UCAS number — that is, the number is a 4-character application code that begins *UC,* plus - , plus single-digit choice number (for example, UC01-1), then the system derives the UCAS number value minus the - and choice elements (for example, *UC01*). Only values beginning *UC* are derived. If any other value is found, the derivation step is skipped.
3. Use default.
4. Do not derive a value and leave the field blank.

Welsh Baccalaureate Advanced Diploma (WELBACC)

Return: Student Record

Entity: Entry Profile

Page Used:

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Page	Page Element
Entry Profile	WELBACC

Field Derivation Rule: Derive a value if the following conditions are met:

- EntryProfile.DOMICILE = XI (Wales)
- Related Instance.REDUCEDI = 00 or 04
- Related Course.COURSEAIM begins with H, I, J or C (that is, not FE)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Use default.
3. If Country is Wales on the HESA Returns page, derive as *NULL ERROR*.
4. If Country is not Wales on the HESA Returns page, do not derive a value and leave the field blank.

Year Left Last Institution (YRLLINST)

Return: Student Record

Entity: Entry Profile

Page Used:

Page	Page Element
Entry Profile	YRLLINST

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- EntryProfile.ARTICLN = 1, 2, 3, or 4

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Use default.
3. Derive as *NULL ERROR*.

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Student Record Return: Qualifications On Entry Entity

The Create Extract process creates Qualifications On Entry entities for each Entry Profile entity in the return where the Instance.COMDATE falls within the reporting period and the related course entity has an undergraduate COURSEAIM that does not begin with D, E, L or M with the exceptions of M22, M26 and M28, which are included.

The process creates the Qualifications On Entry entities only if the Include Student Entities check box is selected on the Create Extract Data page. To create the Qualifications On Entry entities, the process selects entry qualifications that have the Report To HESA check box selected and the QUALTYPE code imported from HESA.

Qualification Grade (QUALGRADE)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	***Page Element***
Entry Profile	Grade

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

The system performs the following steps to derive the values:

1. Derive from the Entry Profile page.
2. Do not derive a value and leave the field blank.

Qualification Subject (QUALSBJ)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	***Page Element***
Entry Profile	Subject

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile page.

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2. Derive as *NULL ERROR.*

Qualification Sitting (QUALSIT)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	***Page Element***
Entry Profile	Sitting

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Do not derive a value and leave the field blank.

Qualification Type (QUALTYPE)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	***Page Element***
Entry Profile	Type

Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Derive as *NULL ERROR.*

Qualification Year (QUALYEAR)

Return: Student Record

Entity: Qualifications On Entry

Page Used:

Page	***Page Element***
Entry Profile	Year

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Field Derivation Rule: Include for all Qualifications On Entry entities.

Derivation Steps:

1. Derive from the Entry Profile page.
2. Derive as *NULL ERROR.*

Student Record Return: Qualifications Awarded Entity

The Create Extract process creates Qualifications Awarded entities for each Instance entity where the student has completed the course and the academic institution has awarded a qualification to the student. The process uses the HESA Instance record for field derivation. If a field value does not exist in the HESA Instance record, the process uses the student degree records for derivation.

The process creates the Qualifications Awarded entities only if the Include Student Entities check box is selected on the Create Extract Data page. The selection logic for Qualifications Awarded that considers student degree records considers the completion term and confer dates when determining if the qualification should be included in the extract. That is, degrees should have status of *Awarded* with either a Confer Date that falls within the reporting period dates or a completion term that overlaps the reporting period (which means, the term end date is on or after the reporting period start date and the term begin date is on or before the reporting period end date).

The process selects Qualifications Awarded records for Instance records where:

- Instance.REDUCEDI = *00,01* or *04* (not Reduced FE or Incoming Visiting/Exchange), and
- Instance.ENDDATE is not null *or* Instance.INTERCALATE = 01

Classification (CLASS)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	***Page Element***
HESA Instance	Classification (Qualifications Awarded group box)
Degree Honors (Records and Enrollment > Graduation > Student Degrees > Degree Honors)	Honors Code
Classification (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Classification)	Honors Code

Field Derivation Rule: Derive a value if one of the following conditions is met:

- QualificationsAwarded.QUAL = M22, M26, M28, H00, H11, H12, H16, H18, H22, H23, H24, H50, I00, I11, I12, or I16

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- Country = England or Wales AND QualificationsAwarded.QUAL begins P, Q, R, S or X

Derivation Steps:

1. If the entity is derived from the HESA Instance - Qualifications Awarded record, derive as the Classification value.
2. If the entity is derived from Student Degrees record, use the mapping on the Classification page to derive as the HESA Honors Code. On the Classification page the HESA Honors Code must be mapped to a HESA classification and a Honors Type where the Honors Type must be *Degree Honors.*
3. Derive as *NULL ERROR.*

Outcome of ITT Instance (OUTCOME)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	***Page Element***
HESA Instance	Outcome of ITT Instance (Qualifications Awarded group box)
HESA Instance	OUTCOME (Instance HESA Data group box)

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Wales
- Related Course.TTCID = 1 or Q

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If the entity is derived from the HESA Instance - Qualifications Awarded record, derive as the Outcome of ITT Instance value.
2. If the entity is derived from Student Degrees record, derive as the OUTCOME value.
3. Use default.
4. Derive as *NULL ERROR.*

Qualification Awarded (QUAL)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

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Page	Page Element
HESA Instance	Qualification Awarded (Qualifications Awarded group box)
Degree (Records and Enrollment > Graduation > Student Degrees > Degree)	Degree
Qualification (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Qualification)	Degree

Field Derivation Rule: Include for all Qualifications Awarded entities.

Derivation Steps:

1. If the entity is derived from the HESA Instance - Qualifications Awarded record, derive as the Qualification Awarded value.
2. If the entity is derived from Student Degrees record, use the mapping on the Qualification page to derive as the mapped HESA Degree code.
3. Derive as *NULL ERROR.*

Teaching Qualifications Gained Sector (TQGSEC)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	Page Element
HESA Instance	Sector (Qualifications Awarded group box)
HESA Instance	TQGSEC (Instance HESA Data group box)
Program HESA Data	TQGSEC (Program HESA Instance Data group box)
Plan HESA Data	TQGSEC (Plan HESA Instance Data group box)
Sub-Plan HESA	TQGSEC (Sub-Plan HESA Instance Data group box)

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland or Northern Ireland
- Related Course.TTCID = 1 or 2

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If the entity is derived from the HESA Instance - Qualifications Awarded record, derive as the Sector value.

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2. If the entity is derived from Student Degrees record, derive as the TQGSEC value. If two awards are reported, use this value for both entities.
3. If the related Instance.COURSEID is based on a sub-plan, derive value from Sub-Plan HESA.
4. Derive value from Plan HESA Data.
5. Derive value from Program HESA Data.
6. Use default.
7. Derive as *NULL ERROR.*

Teacher Qualification Gained Subject (TQGSUB)

Return: Student Record

Entity: Qualifications Awarded

Pages Used:

Page	***Page Element***
HESA Instance (Qualifications Awarded group box)	Subject 1, Subject 2, Subject 3
HESA Instance (Instance HESA Data group box)	TQGSUB, TQGSUB2, TQGSUB3
Program HESA Data (Program HESA Instance Data group box)	TQGSUB, TQGSUB2, TQGSUB3
Plan HESA Data (Plan HESA Instance Data group box)	TQGSUB, TQGSUB2, TQGSUB3
Sub-Plan HESA (Sub-Plan HESA Instance Data group box)	TQGSUB, TQGSUB2, TQGSUB3

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Scotland
- QualificationsAwarded.TQGSEC = 2

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If the entity is derived from the HESA Instance - Qualifications Awarded record, derive as the Subject 1, Subject 2, and Subject 3 values.
2. If the entity is derived from Student Degrees record, derive as the TQGSUB, TQGSUB2, and TQGSUB3 values. Use these values for both entities if two awards are reported.
3. If the related Instance.COURSEID is based on a sub-plan and TQGSUB is defined, derive all values from Sub-Plan HESA.
4. If TQGSUB is defined, derive all values from Plan HESA Data.
5. If TQGSUB is defined, derive all values from Program HESA Data.

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6. Derive single TQGSUB field as *NULL ERROR.*

Note: The system can derive up to three values. Each of the values is included as a separate TQGSUB field in the XML file.

Student Record Return: Student On Module Entity

The Create Extract process can create a maximum of 128 Student On Module records for each Instance in the return to indicate which modules (Campus Solutions courses) the student has been studying during the reporting period. The process selects Student On Module records based on the student's course enrollments and the course offering records included in the related Module entities of the return.

The process creates the Student On Module entities only if the Include Student Entities check box is selected on the Create Extract Data page.

HESA requires Student On Module records only if Instance.STULOAD is greater than zero. However, academic institutions can optionally include Student On Module records in the return when STULOAD = 0.

To choose student enrollment records for the Student on Module entity creation, the process:

- Selects all activated terms for the student career.
- From each activated term, selects classes that satisfy the following conditions:
  - Class Start Date is within the reporting period, or Class End Date is within the reporting period, or Class Start Date is prior to the reporting period and Class End Date is after the reporting period.
  - Status = *Enrolled* or *Dropped.*
  - Units Taken value is greater than zero.
  - Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the Extract check box selected on the HESA Configuration page.
  - A Repeat Code value does not exist or does not match a value defined in the Repeat Code Exclusion region with the Extract check box selected on the HESA Configuration page.
  - If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then the process applies a further filter to the class enrollments. In that case, the process selects the class only if the program value of the enrollment record does not exist or matches one of the program values in the Student Program records for that career and career number.

When the process considers class start and end dates for class enrollments where the Session = *OEE* (open entry/exit), rather than selecting the class start/end dates, the process selects the values from the Student OEE Enrollment Data record for the class enrollment. If the end date is not defined in Student OEE Enrollment Data then the process uses the class end date. The start date is mandatory for a Student OEE Enrollment Data record. Note that the process does not consider linked careers for Student On Module.

For students with a STULOAD value of greater than zero, if there are no relevant class enrolments, the process creates a single Student On Module entity for the student. The process creates the single Student

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On Module entity only if the combination of Plan and Year has been defined as a dummy module and included in the Module entity.

If the Always Include check box is selected on the HESA Dummy Module Data page for the student's year of program, then a Student on Module entity is created together with any eligible class enrollments for the student.

APEL Indicator (APEL)

Return: Student Record

Entity: StudentOnModule

Page Used:

Page	*Page Element*
HESA Module Data	APEL

Field Derivation Rule: If Country = Wales, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Note: You can define an APEL value at Course Offering/Module level if the module is an APEL module only.

Percentage of Module Taught in Celtic Language (LANGPCNT)

Return: Student Record

Entity: StudentOnModule

Page Used:

Page	*Page Element*
HESA Module Data	LANGPCNT

Field Derivation Rule: If Country = Northern Ireland, Scotland, or Wales, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.

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2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Module Identifier (MODID)

Return: Student Record

Entity: Student On Module

Pages Used: None

Field Derivation Rule: Include for all Student On Module entities.

Derivation Step:

1. For each student enrollment record valid for the reporting period, the process determines MODID as a combination of Course ID plus Course Offering Number from the related Course Offering record.

Module Countable (MODCOUNT)

Return: Student Record

Entity: Student On Module

Pages Used:

Page	***Page Element***
Module HESA Data	MODCOUNT

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = Wales
- Course.COURSEAIM begins with C, D, E, L, M, H, I or J

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Module HESA Data page.
2. Use default.
3. Derive as *NULL ERROR.*

Module Outcome (MODOUT)

Return: Student Record

Entity: Student On Module

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Pages Used:

Page	*Page Element*
Enrollment (Records and Enrollment > Enroll Students > Enrollment)	Grading Basis Grade In/Official
Module Outcome (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Module Outcome)	HESA Module Outcome

Field Derivation Rule: Include for all Student On Module entities.

Derivation Steps:

1. Derive as the mapped HESA Module Outcome for the grade selected in the enrollment record.
2. Use default.
3. Derive as *NULL ERROR.*

If HESA Module Data dummy module flag for MODID = Y, derive as *07.*

Module Status (MODSTAT)

Return: Student Record

Entity: Student On Module

Pages Used: None

Field Derivation Rule: Include for all Student On Module entities.

Derivation Steps:

1. Use constant.
2. Derive as *1* if the class start date is before the reporting period, and the class end date is within the reporting period.
3. Derive as *2* if the class start and end dates are within the reporting period.
4. Derive as *3* if the class start date is within the reporting period, and the class end date is after the reporting period.
5. Derive as *6* if the class start date is before the reporting period and the class end date is after the reporting period.

Note that the derivation logic compares class start and end dates with the reporting period dates to determine the status.

If HESA Module Data dummy module flag for MODID = Y, derive as *05.*

When considering class start and end dates for class enrollments where the Session = OEE, rather than selecting the class start and end dates, the derivation logic selects values from the Student OEE

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Enrollment Data record for the class enrollment. If the end date is not defined in Student OEE Enrollment Data record, then the logic uses the class end date. The start date is mandatory in the Student OEE Enrollment Data record.

Module Year (MODYR)

Return: Student Record

Entity: Student On Module

Page Used:

Page	***Page Element***
Module HESA Data	MODYR

Field Derivation Rule: Derive a value if the following conditions are met:

- Country = England or Northern Ireland
- Instance.INSTAPP = 1
- Instance.TYPEYR = 2, 3, 4, or 5

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Derive from the Module HESA Data page.
2. Use default.
3. Derive as *NULL ERROR.*

For dummy modules:

1. Derive from the HESA Dummy Module Data page.
2. Use default.
3. Derive as *NULL ERROR.*

Note: The field is only derived if INSTAPP = *1,* therefore, usually this field will not have any value.

Student Record Return: REF Data Entity

Bundle 52. Coverage is updated to remove COURSEAIM = D01

The Create Extract process creates REF Data entities for each Instance entity where the student is studying a research program and the academic institution is creating a full return for the student.

The process:

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- Selects REF Data entities records for the related course records that have a research COURSEAIM = *D00, L00, L80,* or *L99,* and Instance.REDUCEDI = *00, 01,* or *04*.
- Creates entities based on one of the following steps. If a step does not have records, the derivation moves to the next step. If no records are found, then entities are not created.
  1. If values are defined in HESA Instance – Research Data, then use the records to create entities.
  2. If there is a Research Candidate record for the Instance, one or more supervisor records are selected and the associated Advisor HESA Data records are used to create entities.
  3. If advisor records exist for the student and a role is defined in HESA Returns Setup, one or more advisors are selected and the associated Advisor HESA Data records are used to create entities.
- Creates the REF Data entities only if the Include Student Entities check box is selected as a run parameter for the Create Extract process.

Deriving records from Research Supervisor/Advisor HESA Data (step 2)

1. Research supervisors are selected from the most recent effective dated record (linked to the instance via the research candidate record) where the date is on or before the reporting period end date, and all the following conditions are met:
   - If the Primary Supervisor Only option is selected in HESA Returns Setup, the primary flag of the Research Supervisor record is set.
   - If the Primary Supervisor Only option is *not* selected in HESA Returns Setup, the Supervision Percentage value is greater than zero.
   - If at least one Supervisor Role is defined in HESA Returns Setup, the Supervisor Role matches one of the setup values. If no Supervisor Roles are setup for the return, all roles are considered.
   - The supervisor status matches one of the values defined in HESA Returns Setup.
   - The end date of the supervisor record is not prior to the reporting period start date.
   - The begin date of the supervisor record is not after the reporting period end date.
   - At least one Advisor HESA Data record exists for the supervisor. If no records are found a message is logged.
2. For each selected advisor, the advisor percentage is adjusted to ensure that the total percentage for all selected advisors is 100.
3. Advisor HESA Data records are selected for each supervisor to create the REF Data entities:
   - If more distinct units are defined than allowed for the entity, a message is logged.
   - For each Advisor HESA Data record a weighted percentage is calculated based on the unit percentage and the supervisor's adjusted supervision percentage.
   - If the same REF Unit exists for more than one supervisor the records are merged into a single entity and the weighted percentages added together.

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- If the total of all the UAOPCNT values does not equal exactly 100 because of rounding during the calculation of adjusted and weighted percentages, the largest value is adjusted to ensure the total is 100.

Deriving records from Student Advisor/Advisor HESA data (step 3)

1. Student advisors are selected from the most recent effective dated record where the date is on or before the reporting period end date and all of the following conditions are met:
   - The Advisor Role defined matches one of the roles defined on the HESA Returns page.
   - The Academic Career and Academic Program match the career and program of the Instance being reported.
   - If the Primary Advisor Only option is selected in HESA Returns Setup, the advisor number is 1.
   - If the Primary Advisor Only option is NOT selected in HESA Returns Setup, the Percentage value is greater than zero.
   - At least one Advisor HESA Data record exists for the advisor. If no records are found a message is logged.
2. For each selected advisor, the advisor percentage is adjusted to ensure that the total percentage for all selected advisors is 100.
3. Advisor HESA Data records are selected for each advisor to create the REF Data entities:
   - If more distinct units are defined than allowed for the entity, a message is logged.
   - For each Advisor HESA Data record a weighted percentage is calculated based on the unit percentage and the advisor's adjusted percentage.
   - If the same REF Unit exists for more than one advisor the records are merged into a single entity and the weighted percentages added together.
   - If the total of all the UAOPCNT values does not equal exactly 100 because of rounding during the calculation of adjusted and weighted percentages, the largest value is adjusted to ensure the total is 100.

Collaborating Provider (COLPROV)

Return: Student Record

Entity: REF Data

Pages Used:

Page	***Page Element***
HESA Instance	Collaborating Provider (Research Data region)

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Page	Page Element
Advisor HESA Data	Collaborating Provider

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. If the entity is derived from HESA Instance Data and a collaborating provider is defined, derive the value.
2. If the entity is derived from Research Supervisor/Advisor HESA Data and a collaborating provider is defined, derive the value. However, if multiple Advisor HESA Data records with the same REF Unit are merged and different collaborating providers are defined, then derive the first code in alphabetic order.
3. If the entity is derived from Student Advisor/Advisor HESA Data, derive collaborating provider. However, if multiple Advisor HESA Data records with the same REF Unit are merged and different collaborating providers are defined, then derive the first code in alphabetic order.

RAE Unit of Assessment (OUA2008)

Return: Student Record

Entity: RAE Data

Pages Used:

Page	Page Element
HESA Instance	RAE Unit of Assessment
Advisor HESA Data (Curriculum Management, Instructor/ Advisor Information, Instructor/Advisor Table, Advisor HESA Data)	RAE Unit of Assessment
Student Advisor (Records and Enrollment, Student Background Information, Student Advisor)	Academic Advisor

Field Derivation Rule: Include for all RAE Data entities.

Derivation Steps:

1. If the entity is derived from Instance HESA Data - Research Data record, derive from the HESA Instance page.
2. If the entity is derived from Advisor HESA Data record, derive from the Advisor HESA Data page.

REF Unit of Assessment (UOA2021)

Bundle 52. New

Return: Student Record

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Entity: REF Data

Pages Used:

Page	*Page Element*
HESA Instance	REF Unit 2021
Advisor HESA Data (Curriculum Management, Instructor/ Advisor Information, Instructor/Advisor Table, Advisor HESA Data)	REF Unit 2021

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. If the entity is derived from HESA Instance Data - Research Data record, derive as REF Unit 2021.
2. If the entity is derived from Advisor HESA Data record, derive as REF Unit 2021.
3. If the entity is derived from Student Advisor HESA Data record, derive as REF Unit 2021.
4. Derive as null.

Unit of Assessment Percentage (UOAPCNT)

Return: Student Record

Entity: REF Data

Pages Used:

Page	*Page Element*
HESA Instance	Unit Of Assessment Percentage
Advisor HESA Data (Curriculum Management > Instructor/ Advisor Information > Instructor/Advisor Table > Advisor HESA Data)	Unit Of Assessment Percentage
Student Advisor (Records and Enrollment, Student Background Information, Student Advisor)	Academic Advisor

Field Derivation Rule: Include for all REF Data entities.

Derivation Steps:

1. If the entity is derived from Instance HESA Data - Research Data record, derive from the HESA Instance page.
2. If the entity is derived from Research Supervisor/Advisor HESA Data, derive from the Advisor HESA Data page weighted for multiple supervisors.

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3. If the entity is derived from Student Advisor/Advisor HESA Data record, derive from the Advisor HESA Data page.

REF Unit of Assessment (UOA2014)

Return: Student Record

Entity: REF Data

Pages Used:

Page	*Page Element*
HESA Instance	REF Unit of Assessment
Advisor HESA Data (Curriculum Management, Instructor/Advisor Information, Instructor/Advisor Table, Advisor HESA Data)	REF Unit of Assessment

Field Derivation Rule: Include for all REF Data entities.

Derivation Steps:

1. If the entity is derived from Instance HESA Data - Research Data record, derive from the HESA Instance page.
2. If the entity is derived from Research Supervisor/Advisor HESA Data, derive from Advisor HESA Data page.
3. If the entity is derived from Student Advisor/Advisor HESA Data record, derive from the Advisor HESA Data page.

Student Record Return: Learner Employment Status Entity

For each Instance entity, the Create Extract process creates Learner Employment Status entities when all of the following conditions are met:

- Country = England
- You have selected the Include FE check box on the HESA Returns page
- Instance.FESTUMK = 1, 3 or 4 AND Instance.REDUCEDI = 00 or 01 AND Instance.FUNDMODEL is between 25 and 99 inclusive

The Learner Employment Status entities are created based on Employment Status records defined on the Further Education page, starting with the record with the lowest Record Number value. There is no limit on the number of entities. If records are not defined on the page, then the process does not create the entities.

Date Employment Status Applies To (DATEEMPSTATAPP)

Return: Student Record

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Entity: Learner Employment Status

Page Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Status Date

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page, converted to YYYY-MM-DD format.

Employer Identifier (EMPID)

Return: Student Record

Entity: Learner Employment Status

Page Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Employer ID

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page.
2. Derive as *NULL ERROR* if one of the following conditions is met:
   - Instance.PROGTYPE = 02, 03, 20, 21, 22, 23, or 25
   - Instance.FUNDMODEL = 70 or 99
3. Do not derive a value and leave the field blank.

Employment Status (EMPSTAT)

Return: Student Record

Entity: Learner Employment Status

Page Used:

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Page	Page Element
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Employment Status

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page.

ILR Agreement Identifier (ILRAGREEID)

Bundle 52. New

Return: Student Record

Entity: Learner Employment Status

Page Used:

Page	Page Element
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Agreement ID

Field Derivation Rule: Derive a value if all conditions are met:

- Instance.FUNDMODEL = 36
- A LearningDeliveryFAM entity exists for the Instance with LEARNDELFAMTYPE = ACT and LEARNDELFAMCODE = 1

Derivation Steps:

1. Derive from the Further Education page.
2. Derive as NULL ERROR.

Workplace Location Postcode (WORKLOCPOSTCODE)

Return: Student Record

Entity: Learner Employment Status

Page Used:

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Page	Page Element
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Workplace Postcode

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page.

   Formatting: If the value is more than four continuous characters, add a space before the final three characters of the postcode.

2. If Instance.PROGTYPE = 02, 03, 10, 20 or 21 or Instance.FUNDMODEL = 45, do not derive a value, leave the field blank and set Reason For Null = *1*.

3. Do not derive a value and leave the field blank.

Student Record Return: Employment Status Monitoring Entity

For each Employment Status entity created, the Create Extract process creates Employment Status Monitoring entities. The Employment Status Monitoring entities are created based on the Employment Monitoring records defined on the Further Education page, starting with the record with the lowest Record Number value. If records are not defined on the page, then the process does not create the entities.

Employment Status Monitoring Code (ESMCODE)

Return: Student Record

Entity: Employment Status Monitoring

Page Used:

Page	Page Element
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Code (in the Employment Monitoring region)

Field Derivation Rule: Include for all Employment Status entities.

Derivation Steps:

1. Derive from the Further Education page.

Employment Status Monitoring Type (ESMTYPE)

Return: Student Record

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Entity: Employment Status Monitoring

Page Used:

Page	*Page Element*
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Type (in the Employment Monitoring region)

Field Derivation Rule: Include for all Employment Status entities.

Derivation Steps:

1. Derive from the Further Education page.

Student Record Return: Learner FAM Entity

For each Instance entity, the Create Extract process creates Learner Funding and Monitoring (FAM) entities when:

- Country = England
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Include FE check box is selected on the HESA Returns page

The Learner Funding and Monitoring entities are created based on the Learner records defined on the Further Education page. A maximum of 15 records can be defined. If records are not defined on the page, then the process does not create the entities.

Learner Funding and Monitoring Code (LEARNFAMCODE)

Return: Student Record

Entity: Learner FAM

Page Used:

Page	*Page Element*
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Code (in the Learner region)

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page.

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Learner Funding and Monitoring Type (LEARNFAMTYPE)

Return: Student Record

Entity: Learner FAM

Page Used:

Page	*Page Element*
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Type (in the Learner region)

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page.

Student Record Return: Learning Delivery FAM Entity

For each Instance entity, the Create Extract process creates Learner Delivery Funding and Monitoring entities when:

- Country = England
- Instance.FESTUMK = 1, 3, 4, or 5
- Instance.REDUCEDI = 00 or 01
- Include FE check box is selected on the HESA Returns page

The Learner Delivery Funding and Monitoring entities are created based on the Learning Delivery records defined on the Further Education page. A maximum of 15 records can be defined. If records are not defined on the page, then the process does not create the entities.

Student Record Return: Learning Delivery Funding and Monitoring Code (LEARNDELFAMCODE)

Return: Student Record

Entity: Learning Delivery FAM

Page Used:

Page	*Page Element*
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Code (in the Learning Delivery region)

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Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page.

Learning Delivery Funding and Monitoring Date Applies From (LEARNDELFAMFROM)

Return: Student Record

Entity: Learning Delivery FAM

Page Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Date From (in the Learning Delivery region)

Field Derivation Rule: Derive a value if LearningDeliveryFAM.LEARNDELFAMTYPE = LSF, ACT, or ALB. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the Further Education page in the format YYYY-MM-DD.
2. Derive as *NULL ERROR*.

Learning Delivery Funding and Monitoring Date Applies To (LEARNDELFAMTO)

Return: Student Record

Entity: Learning Delivery FAM

Page Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Date To (in the Learning Delivery region)

Field Derivation Rule: Derive a value if LearningDeliveryFAM.LEARNDELFAMTYPE = LSF, ACT, or ALB. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the Further Education page in the format YYYY-MM-DD.
2. Derive as *NULL ERROR*.

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Learning Delivery Funding and Monitoring Type (LEARNDELFAMTYPE)

Return: Student Record

Entity: Learning Delivery FAM

Page Used:

Page	*Page Element*
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Type (in the Learning Delivery region)

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Further Education page.

Student Record Return: Learning Delivery Work Placement Entity

For each Instance entity, the Create Extract process creates Learning Delivery Work Placement entities when:

- Country = England
- Instance.FESTUMK = 1, 3 or 4
- Instance.REDUCEDI = 00 or 01
- Instance.COMDATE is on or after 2014-08-01
- Instance.FUNDMODEL is not 99
- Include FE check box is selected on the HESA Returns page

Entities are created based on placement records defined in HESA Instance Data, Further Education, Work Placement.

Records are not considered if the end date is earlier than the reporting period start date or the start date is after the reporting period end date.

Work Placement Employer Identifier (LEARNWORKEMPID)

Return: Student Record

Entity: Learning Delivery Work Placement

Page Used:

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Page	Page Element
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Employer ID (in the Work Placement region)

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. Derive from Further Education.
2. Derive as null.

Work Placement End Date (LEARNWORKEND)

Return: Student Record

Entity: Learning Delivery Work Placement

Page Used:

Page	Page Element
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	End Date (in the Work Placement region)

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. Derive from Further Education, converted to YYYY-MM-DD.
2. Derive as null.

Work Placement End Date (LEARNWORKEND)

Return: Student Record

Entity: Learning Delivery Work Placement

Page Used:

Page	Page Element
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	End Date (in the Work Placement region)

Field Derivation Rule: Include for all entities.

Derivation Steps:

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1. Derive from Further Education, converted to YYYY-MM-DD.
2. Derive as null.

Work Placement Hours (LEARNWORKHOURS)

Return: Student Record

Entity: Learning Delivery Work Placement

Page Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Hours (in the Work Placement region)

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. Derive from Further Education.
2. Derive as NULL ERROR.

Work Placement Start Date (LEARNWORKSTART)

Return: Student Record

Entity: Learning Delivery Work Placement

Page Used:

Page	***Page Element***
Further Education (Records and Enrollment, Career and Program Information, HESA Instance Details, Further Education)	Start Date (in the Work Placement region)

Field Derivation Rule: Include for all entities.

Derivation Steps: Derive from Further Education, converted to YYYY-MM-DD.

Student Record Return: Financial Support Entity

For each Instance entity, the Create Extract process can create up to four Financial Support entities when Country = England.

The Financial Support entity depends on the following instance fields for selecting data:

- Instance.FEEELIG

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- Instance.FUNDCODE
- Course.COURSEAIM

The process creates the extract records (SSR_HE_FS_EXT, SSR_HE_FS_EX_FL) only if you have selected the Include Student entities check box on the Create Extract Data page.

For each Instance (with a HUSID and NUMHUS) in the Instance Extract table that the process selects (that is, Instance with status of ACTIVE):

If the following conditions are all met, the process creates Financial Support entities based on the records defined in HESA Instance Data record:

- Country = England
- Instance.REDUCEDI = 00 or 01
- Instance.FEEELIG = 1
- Instance.FUNDCODE = 1 or 7 or has no value
- 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, M28, M71, M73, M88
- Instance.EXCHANGE is not 4, G or Z

If all the conditions are not met, a Financial Support entity is not required and the process skips to the next Instance.

Note: For England, the system derives the FUNDCODE only when Instance.FESTUMK is not 1 or 4. The system also checks whether the derived values are blank so that Financial Support entities can be derived when FESTUMK is 1 or 4.

Financial Support Amount (FINAMOUNT)

Return: Student Record

Entity: Financial Support

Page Used:

Page	***Page Element***
HESA Instance (Financial Support region)	Amount

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the HESA Instance page.

Note: Values to be returned in pounds (£).
A FINAMOUNT value is required to define a Financial Support record in HESA Instance record.

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Financial Support Type (FINTYPE)

Return: Student Record

Entity: Financial Support

Page Used:

Page	*Page Element*
HESA Instance (Financial Support region)	Type

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the HESA Instance page.

Note: A FINTYPE value is required to define a Financial Support record in HESA Instance record.

Student Record Return: ITT Placement

Bundle 52. This is updated to remove the restriction on ENTRYRTE = 01.

The ITT Placement entity depends on the following instance fields to select data:

- Instance.ENTRYRTE
- Instance.REDUCEDI

The Create Extract process creates the extract records if you select the Include Student Entities check box on the Create Extract Data page.

If you do not select Retain Data from Previous Run, existing extract records are deleted regardless of their status.

For each instance (with a HUSID and NUMHUS) in the Instance Extract table that the process selects (that is, instance with status of ACTIVE), the following conditions must be met (Instance.ENTRYRTE is not null *and* Instance.REDUCEDI = 00, 01, or 04) so that:

- Placement 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, that is, not a future date.
- Only records with a Start Date that falls within the reporting period are selected.

If the conditions are not met, an ITT Placement entity is not required and the process skips to the next instance.

Number of days Spent in Placement School (PLMNTDYS)

Return: Student Record

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Entity: ITT Placement

Page Used:

Page	*Page Element*
HESA Instance (ITT Placement region)	Days

Field Derivation Rule: Include for all Instance entities.

Derivation Steps: Derive value from HESA Instance page.

Placement School (PLMNTSCH)

Return: Student Record

Entity: ITT Placement

Page Used:

Page	*Page Element*
HESA Instance (ITT Placement region)	School URN

Field Derivation Rule: Include for all Instance entities.

Derivation Steps: Derive value from HESA Instance page.

Student Record Return: Placement

The ITT Placement entity depends on the Student entity. The Selection logic is as follows:

- If Retain Data from Previous Run is selected,
  - Delete any existing extract record for the Return with status *INACTIVE*.
  - Update any existing extract record for the Return with status of *ACTIVE*, then set its status to *INACTIVE*.
- If Retain Data from Previous Run is not selected, delete all existing extract records for the Return irrespective of status.
- For all Student entity records with status *ACTIVE,*
  - Placement entities are created based on the ITT Placement records (SSR_HE_INST_PLC) defined for the most recent effective-dated HESA Instance Data record, where the effective date is not beyond the reporting period end date (not a future reporting period). A maximum of 5 ITT Placement records can be defined in a HESA instance.
  - Only records with Start Dates that fall within the reporting period are selected.

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- No entities are created if relevant Placements records are not found.

Note: In the Student return, ITT Placement is only reported where ENTRYRTE = 01.
The ITT return allows ENTRYRTE a subset of the codes allowed for the Student return: 01 (Provider-led), 02 (School Direct tuition fee), 03 (School Direct salaried), 09 (Undergraduate Opt-in).

The ITT Placement entity contains two fields.

Placement School

Return: ITT

Entity: ITT Placement

Page Used:

Page	*Page Element*
HESA Instance Data (ITT Placement)	School URN

Field Derivation Rule: Include for all Instance entities.

Derivation Step: Derive the value from the HESA Instance Data – ITT Placement.

Derivation Note: A required field on the page. Valid values are 1 to 999999.

Number of Days Spent in Placement School

Return: ITT

Entity: ITT Placement

Page Used:

Page	*Page Element*
HESA Instance Data (ITT Placement)	Days

Field Derivation Rule: Include for all Instance entities.

Derivation Step: Derive the value from the HESA Instance Data – ITT Placement.

Derivation Note: A required field on the page. Valid values are 1 to 999.

Student Record Return: Mobility Entity

Bundle 52. The selection of mobility records is updated to allow mobility records to be reported when LOCSDY = Z.

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For each Instance entity, the Create Extract process can create unlimited number of Mobility entities.

The process creates the mobility extract records (SSR_HE_MB_EXT, SSR_HE_MB_EX_FL) only if you have selected the Include Student entities check box on the Create Extract Data page.

If the Retain Data from Previous Run check box is selected on the Create Extract Data page, the process:

- Deletes any existing extract records for the return with status of INACTIVE.
- Updates any existing extract records for the return with status of ACTIVE and sets status of these records to INACTIVE.

If Retain Data from Previous Run is not selected, the process deletes existing extract records of any status for the return.

For each Instance (with a HUSID and NUMHUS) in the Instance Extract table for this run of the return (that is, with status of ACTIVE), if Instance.LOCSDY = T, U, or Z and Instance.REDUCEDI = 00 or 01:

- The process creates Mobility entities 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 (that is, not in future).
- The process selects only records that cover some or all of this reporting period based on the Mobility Start and End, where either:

  The Start Date or the End Date falls within the reporting period

  Or the Start Date is before the reporting period start date and the End Date is after the reporting period end date.
- The process selects only non-UK records whose location code is *not* XF, XG, XH, XI, XK, XL, JE, GG or IM.
- If either the Start Date or the End Date is outside of the reporting period (that is, overlapping) the process includes the record only if one of these conditions is met:
  - The duration in this reporting period is 25 days or more (that is, 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: That is, 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 process does not include the record because 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. That is, 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.

For each Instance (with a HUSID and NUMHUS) in the Instance Extract table for this run of the return (that is, with status of ACTIVE), if Instance.LOCSDY is not equal to T or U and Instance.REDUCEDI is not equal to 00 or 01, then process does not create the Mobility entity and skips to the next Instance.

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Mobility Duration (MOBDURA)

Return: Student Record

Entity: Mobility

Page Used:

Page	*Page Element*
Mobility (Records and Enrollment, Career and Program Information, HESA Instance Details, Mobility)	Start Date and End Date

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. If the Start and End Date both fall within the reporting period (that is, not overlapping), derive 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. That is, days from the Start Date or reporting period start (whichever is later) until the End Date or reporting period end (whichever is 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.

   Derive as total number of days converted to weeks

Mobility Location (MOBLOCA)

Return: Student Record

Entity: Mobility

Page Used:

Page	*Page Element*
Mobility (Records and Enrollment, Career and Program Information, HESA Instance Details, Mobility)	Location

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Mobility page.

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Mobility Scheme (MOBSCHEME)

Return: Student Record

Entity: Mobility

Page Used:

Page	*Page Element*
Mobility (Records and Enrollment, Career and Program Information, HESA Instance Details, Mobility)	Scheme

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Mobility page.

Mobility Type (MOBTYPE)

Return: Student Record

Entity: Mobility

Page Used:

Page	*Page Element*
Mobility (Records and Enrollment, Career and Program Information, HESA Instance Details, Mobility)	Type 1

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

1. Derive from the Mobility page.

Mobility Type (MOBTYPE2, MOBTYPE3)

Return: Student Record

Entity: Mobility

Page Used:

Page	*Page Element*
Mobility (Records and Enrollment, Career and Program Information, HESA Instance Details, Mobility)	Type 2and Type 3

Field Derivation Rule: Include for all Instance entities.

Derivation Steps:

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1. Derive from the Mobility page.
2. Do not derive a value and leave the field blank.

Aggregate Offshore Return: Institution Entity

The Create Extract process creates a single entity record for the institution with the RECID and UKRPN fields.

Record Type Indicator (RECID)

Return: Aggregate Offshore

Entity: Institution

Pages Used:

Page	***Page Element***
Reporting Period	Record Year
Returns	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where *YY* is the final two digits of the Record Year (for example, 09 for 2009) and *NNN* is the 3-digit Record ID for the seeded return.
2. Derive as *NULL ERROR.*

For Aggregate Offshore Return, the Record ID must be 052. The Record ID is delivered with the CS updates of April 2009.

UK Provider Reference Number (UKPRN)

Return: Aggregate Offshore

Entity: Institution

Page Used:

Page	***Page Element***
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

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1. Derive from the HESA Returns page.
2. Derive as *NULL ERROR.*

Aggregate Offshore Return: Provision Entity

The Create Extract process creates Provision entities for Offshore plans and Offshore subplans. That is, the process selects only those subplans for which the Offshore Sub-Plan check box is selected on the Sub-Plan HESA page. If you have selected the Enable Sub-Plan Reporting check box on the HESA Returns page, the process selects only those subplans for which you have selected the Report to HESA and Offshore Sub-Plan check boxes on the Sub-Plan HESA Data page. Also, the process selects only those plans for which the Offshore Plan check box is selected on the Plan HESA Data page. If you have not selected the Enable Sub-Plan Reporting check box, the process selects only those plans for which you have selected the Report to HESA and Offshore Plan check boxes on the Plan HESA Data page.

Country of Activity (COUNTRY)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

Page	***Page Element***
Plan HESA Data	COUNTRY
Sub-Plan HESA	COUNTRY

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.
2. If Provision entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Use default.
5. Derive as *NULL ERROR.*

Institutions Own Campus Identifier (INSTCAMP)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

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Page	Page Element
Campus (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Campus)	HESA Institutions Own Campus
Taxonomy/Campus (Set Up SACR > Foundation Tables > Academic Structure > Academic Program Table > Taxonomy/Campus)	Campus

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.
2. If Provision entity is based on a subplan, select the associated program's campus from the Taxonomy/Campus page. Use the HESA Institutions Own Campus value mapped to the selected campus.
3. If Provision entity is based on a plan, select the associated program's campus from the Taxonomy/Campus page. Use the HESA Institutions Own Campus value mapped to the selected campus.
4. Use default.
5. Do not derive a value and leave the field blank.

Level of Provision (LEVEL)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

Page	Page Element
Plan HESA Data	LEVEL
Sub-Plan HESA	LEVEL

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.
2. If Provision entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Use default.
5. Derive as *NULL ERROR*.

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Number of Students (HEADCOUNT)

Return: Aggregate Offshore

Entity: Provision

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Derive this value by performing a similar selection as for the existing Instance return but restricting the selection to the plan and subplan of each Provision entity. The return will contain just the count. However, in the log file list each student included in the count including their EMPLID, and plan or subplan.

2. If students are not found, derive as *0.*

In the first step, the process includes students who have a plan or subplan that overlap the reporting period and have been enrolled; that is, the student either has a status of *Enrolled* or has an associated enrolled classes that the student enrolled on or before reporting period end date

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Note: If the process does not return a HEADCOUNT value for the plan or subplan, include the student in the extract but do not include the student in the XML file.

Type of Activity (TYPE)

Return: Aggregate Offshore

Entity: Provision

Pages Used:

Page	***Page Element***
Plan HESA Data	TYPE
Sub-Plan HESA	TYPE

Field Derivation Rule: Include for all Provision entities.

Derivation Steps:

1. Use constant.

2. If Provision entity is based on a subplan, derive from the Sub-Plan HESA page.

3. Derive from the Plan HESA Data page.

4. Use default.

5. Derive as *NULL ERROR.*

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ITT Return: Institution Entity

The Create Extract process creates a single entity record for the institution with the RECID and UKRPN fields.

Record Type Indicator (RECID)

Return: ITT

Entity: Institution

Pages Used:

Page	***Page Element***
Reporting Period	Record Year
Returns	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where *YY* is the final two digits of the Record Year (for example, 09 for 2009) and *NNN* is the 3-digit Record ID for the seeded return.
2. Derive as *NULL ERROR.*

For ITT Return, the Record ID is 053 which is delivered with Campus Solutions.

UK Provider Reference Number (UKPRN)

Return: ITT

Entity: Institution

Page Used:

Page	***Page Element***
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as *NULL ERROR.*

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ITT Return: Student Entity

The Create Extract process creates ITT Student entities only if all the following conditions are satisfied:

- Report to HESA check box is selected on the HESA Instance page for the HESA Instance record.
- The student's program commencement date is before or within the reporting period.
- Either: (a) the student has been term activated for a term that begins within the reporting period and the student has at least one enrolled class related to that term or (b) the student has an FTE value of greater than zero for the reporting period. The process determines the FTE value for the reporting period from the HESA Instance record as either the Override FTE value or else the Calculated FTE value.
- The most recent effective dated Student Program stack record has a Program Status matching one of the Eligible Program Statuses defined for the return on the HESA Returns page.
- If a subplan is selected as the run parameter, check that the Report to HESA check box is selected and the TTCID value is *1* for the subplan on the Sub-Plan HESA page.
- If subplan is not selected, check that the Report to HESA check box is selected and the TTCID value is *1* for the plan on the Plan HESA Data page or for the program on the Program HESA Data page.

Note: Students are not included in the return if TTCID is *0* (zero) or is one of the codes only relevant to the Student return (*5, 9, D, F, J, K*) or is blank or is *NULL ERROR*.

If all the conditions are satisfied, then the process create a record in the ITT Student Extract table with status set to ACTIVE using the following values:

- EMPLID
- HUSID: The process determines this value from External System ID record for the EMPLID, where the ID type is the same as that defined for HUSID on the HESA Types page. If HUSID does not exist, the process creates a new HUSID.
- NUMHUS (Student Instance Number): The process determines this value from the HESA Instance record as either Linked Career and Linked Career Number (if defined). Otherwise, it uses a combination of Career and Career Number as the NUHMUS value, that is ACAD_CAREER and STDNT_CAR_NBR. For example, UGRD1.
- COURSEID: If a sub-plan is selected as the run parameter, the process uses the Sub-Plan code as the COURSEID, If the subplan is not selected, the process uses the plan code.

If you provided an EMPLID for the Student ID run parameter, the process creates ITT Student entity records for only the selected EMPLID.

The Create Extract process selects External Degree records to derive the degree fields (such as DEGENDDT and DEGEST). If the student has multiple records, the process selects the most recent record.

If you have selected the Null Errors Only check box for the Include Student Entities on the Create Extract Data page, the process selects distinct EMPLIDs from the existing active ITT extract data, where at least

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one field in the Student or Course Subject extract data has a derived value of *NULL ERROR*. The process then selects Student entity records for these EMPLIDs.

If you have selected the Validation Errors Only check box for the Include Student Entities, the process first deletes any Validation Error staging records where EMPLID is blank. Then, it selects distinct EMPLIDs from the Validation Error staging table. The process selects Student entity records for these EMPLIDs. Finally, it deletes records from the Validation Error staging table where EMPLID is populated.

Allocated Place (ALLPLACE)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
HESA Instance	ALLPLACE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive value from HESA Instance page.
3. Use default.
4. Derive as NULL ERROR.

Date of Birth (BIRTHDTE)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Biographical Details (Campus Community > Personal Information (Student) > Add/Update a Person > Biographical Details)	Date of Birth

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Biographical Details page in the format YYYY-MM-DD.
2. Derive as *NULL ERROR*.

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Bursary Level Award (BURSLEV)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
HESA Instance	BURSLEV

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Start Date of Instance (COMDATE)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
HESA Instance	Start Date of Instance

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. If there is a Research Candidate record for the instance:
    a. Select the Begin Date (SSR_RS_BEGIN_DT) from the most recent active Consumption record where the effective date is on or before the reporting period end date.
    b. Derive the Begin Date formatted to YYYY-MM-DD.
    c. Match the Research Candidate record (SSR_RS_CAND_HDR) to the instance on EMPLID, Institution, Career and Career Number to find the Research Candidate Number (SSR_RS_CANDIT_NBR). If multiple records are found, the record with the highest candidate number is selected.

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d. Associate consumption records (SSR_RS_CONSMPTN) with the Research Candidate record by EMPLID, Institution and Research Candidate Number.

The calculated value is stored in the HESA Instance Data record.

3. Use the following process to calculate the earliest class start date for enrolled classes related to the Instance being reported. This selection is similar to that done for StudentOnModule except that it is not restricted to classes overlapping the reporting period and considers enrollments for linked careers.

   a. Select all activated terms for the student career of the Instance.

   b. From each activated term, select classes that satisfy the following conditions:

      – Status = *Enrolled*

      – Units Taken value is greater than zero.

      – Grading basis value matches one of the values defined in the Grading Basis Inclusion region with the Extract check box selected on the HESA Configuration page.

      – Repeat Code value does not exist or does not match a value defined in the Repeat Code Exclusion region with the Extract check box selected on the HESA Configuration page.

      – If the student has multiple careers with the same Academic Career value as the career being processed (that is, the same career value with different career numbers), then apply a further filter to the class enrollments. In such a case, select the class only if the program value of the enrollment record does not exist or matches one of the program values in the Student Program records for that career and career number.

   c. If the Instance has been linked to a prior student career using the Linked Career and Linked Career Number fields in the HESA Instance record, then also consider classes for the previous career.

   d. Derive the earliest Class Start Date from all the selected classes as COMDATE.

4. Derive as the earliest Effective Date of the HESA Instance records.

Course Identifier (COURSEID)

Return: ITT

Entity: Student

Pages Used: None

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. If subplan is being reported to HESA, derive as COURSEID from the Academic Sub-Plan Table record.

2. If plan is being reported to HESA, derive as COURSEID from the Academic Plan Table record.

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Course Title (CTITLE)

Return: ITT

Entity: Student

Pages Used:

Page	*Page Element*
Plan HESA Data	Course Title
Sub-Plan HESA	HESA Course Title
Academic Plan Table (Set Up SACR > Foundation Tables > Academic Structure > Academic Plan Table)	Academic Plan
Academic Sub-Plan Table (Set Up SACR > Foundation Tables > Academic Structure > Academic SubPlan Table)	Academic Subplan

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive as the HESA Course Title value from the Sub-Plan HESA page.
2. If the Course Title field does not have a value, use a combination of the plan and subplan descriptions from the Academic Plan Table and Academic Sub-Plan Table pages (that is, .DESCR from PS_ACAD_PLAN_TBL + space + DESCR from PS_ACAD_SUBPLN_TBL).
3. Derive as the Course Title value from the Plan HESA Data page.
4. If the Course Title field does not have a value, use the plan description from the Academic Plan Table page (that is, DESCR from PS_ACAD_PLAN_TBL).

Course Mode (CRMODE)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
HESA Instance	CRMODE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Convert the MODE value to a CRMODE value as follows: if MODE = 01, 02, 12, 13, 14, 23, 24, 25, 63 or 73, derive as *1* (full-time) else derive as *2* (part-time).

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3. Do not derive a value and leave the field blank.

Previous Degree Country (DEGCTRY)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
External Organization Location (Campus Community, Organization, Create/Maintain Organizations, Organization Locations, Location Details, Location History)	Country
Nationality (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Nationality)	HESA Nationality

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period
- Student.ITTAIM = 110, 113, 020, 027 or 031
- Student.DEGEST does not exist

Derive as *NULL ERROR* if the conditions are not met.

Derivation Steps:

1. Derive from the External Organization Location page.

   Select the most recent External Education Organization record with a Degree status of *complete* associated with the current reporting period. Select the most recent effective dated location record, if there are multiple records.

   It is possible for the Ext Org to have multiple Location records with the same effective date. In this case, select the record with the lowest Location ID to determine the country.

   Use the mapping on the Nationality page to derive as the mapped HESA Nationality code. Otherwise, derive as the COUNTRY_2CHAR value if the mapping does not exist.

2. Use default.

3. Derive as *NULL ERROR.*

The normal 2-character GB code is not valid for DEGCTRY. Therefore, if the value GB is derived, the system changes *GB* to the valid code *XK* (United Kingdom, not otherwise specified).

Previous Degree End Date (DEGENDDT)

Return: ITT

Entity: Student

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Page Used:

Page	***Page Element***
Courses and Degrees (Student Admissions, Application/ Transcript Loads, Education, Courses and Degrees)	Degree Date

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as *NULL ERROR* if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive from the Courses and Degrees page for the selected record.
2. Use default.
3. Derive as *NULL ERROR.*

Previous Degree Establishment (DEGEST)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Region (Campus Community, Organization, Create/Maintain Organizations, Organization Table, Region)	HESA Degree Establishment

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020, 027 or 031.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Organization record associated with the current reporting period. Derive from the Region page for the selected record. Convert using 2-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL).
2. Use default.
3. Do not derive a value and leave the field blank.

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Previous Degree Length in Years (DEGLENGTH)

Return: ITT

Entity: Student

Page Used: None

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as *NULL ERROR* if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive as Degree Date minus From Date from the External Education record. Convert number of days to years and round off to the nearest year.
2. Use default.
3. Derive as *NULL ERROR.*

The previous degree length is derived as the nearest number in whole years.

Previous Degree Start Date (DEGSTDT)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
External Education (Student Admissions, Application/ Transcript Loads, Education, External Education)	From Date

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020 or 031.

Derive as *NULL ERROR* if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive from the External Education page for the selected record.
2. Use default.

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3. Derive as *NULL ERROR.*

Previous Degree Type (DEGTYPE)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Degree Table (Setup SACR, Foundation Tables, Academic Structure, Degree Table)	HESA Degree Type

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period.
- Student.ITTAIM = 110, 113, 020, 027 or 031.

Derive as *NULL ERROR* if the conditions are not met.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete associated with the current reporting period. Derive from the Degree Table page for the selected degree.
2. Use default.
3. Derive as *NULL ERROR.*

Disability (DISABLE)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Person HESA Data	DISABLE
Impairment AUS (Campus Community > Personal Information > Health Information > Impairment AUS)	Type of Impairment
Disability (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Disability)	HESA Disability Code

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

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1. Derive from the Person HESA Data page.
2. If the student has a single impairment record, use the HESA Disability code from the mapping between the impairment type and the HESA disability code.
3. If the student has multiple mapped impairment records and all the records are mapped to a single HESA disability code, derive the HESA code.
4. If the student has multiple mapped impairment records and the records are mapped to more than one HESA disability code other than 00, 97, 98, or 99, then derive '08' (multiple disabilities).
5. If the student has multiple mapped impairment records and only one record is mapped to a HESA disability code other than 00, 97, 98, or 99, then derive as *NULL ERROR*.
6. If the student has multiple mapped impairment records and the records are all mapped to HESA disability codes 00, 97, 98, or 99, then derive the lowest mapped HESA code.

   Note: Note: If all records are mapped to the same code, it is derived in step 3.

7. Use default.
8. Derive as *NULL ERROR.*

You can define a default as either *00* (no known disability) or *99* (not known).

Disabled Student Allowance (DISALL)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
HESA Instance	DISALL
Impairment AUS (Campus Community, Personal Information, Health Information, Impairment AUS)	Support Services Request
Disability (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Disability)	HESA Disability Allowance

Field Derivation Rule: If related Student.DISABLE is between 02 and 96, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If the student has a Support Services Request value defined on the Impairment AUS page, use the mapped HESA Disability Allowance code from the Disability page.

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4. Use default.
5. Derive as *NULL ERROR.*

Discretionary Funding (DISCFUND)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
HESA Instance	DISCFUND

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Use default.
4. Derive as *NULL ERROR.*

Note: DISCFUND is not derived when TTCID = *2*. Valid values for DISCFUND are *1* (Received) and *2* (Not received).

Domicile (DOMICILE)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Campus Community > Personal Information (Student) > Identification (Student) > Residency Data > Residency Self-Report	Residency Self-Report — State and Country
Entry Profile	DOMICILE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Entry Profile page.

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2. Select Residency Self-Report records. If the Country value is not GBR, then select the related two-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL).

   If a mapping exists in the HESA Nationality/Domicile Mapping for the Campus Solutions Country code, use the mapped HESA value. Otherwise, use the COUNTRY_2CHAR code.

3. If a Residency Self-Report record exists, Country value is GBR, and State is defined, then map the Country and State to a HESA Country Code in the UCAS APR Mapping. Otherwise, log an error message and derive *XK*.

   If State is not defined, report *XK*.

4. Use default.

5. Derive as NULL ERROR.

End Date of Instance (ENDDATE)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Student Program	Program Action Action Reason Effective Date
HESA Instance	ENDDATE
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.

2. If the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page, then derive the effective date of the record formatted to YYYY-MM-DD.

3. Do not derive a value, leave the field blank and set ReasonForNull = *9*.

ITT Entry Route (ENTRYRTE)

Return: ITT

Entity: Student

Pages Used:

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Page	Page Element
Program HESA Data	ENTRYRTE
Plan HESA Data	ENTRYRTE
Sub-Plan HESA	ENTRYRTE
HESA Instance	ENTRYRTE

Field Derivation Rule: Include for all Student entities

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance page.
3. If Instance.COURSEID is based on a sub-plan, derive value from the Sub-Plan HESA page.
4. Derive value from Plan HESA Data page.
5. Derive value from Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

Ethnicity (ETHNIC)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Person HESA Data	ETHNIC
Ethnicity (Campus Community > Personal Information (Student) > Biographical (Student) > Personal Attributes > Ethnicity)	Regulatory Region, Ethnic Group
Ethnicity (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Ethnicity)	HESA Ethnic Code

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Select Person Ethnicity records as follows:

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- If a single record exists, use that record.
- If multiple records exist and one is marked as Primary on the Campus Community Ethnicity page, use that record.
- If multiple records exist and none are marked as Primary, select the record with the highest Percentage defined in the Ethnicity Detail page.
- If multiple records are indistinguishable, select the lowest alphabetic Ethnic Group code.
- For the selected record, use the HESA Ethnic code from the mapping between the Ethnic Group, Regulatory Region, and the HESA Ethnic code. If no mapping exists, log an error message and skip to next step.

3. Use default.
4. Derive as *NULL ERROR.*

Forenames (FNAMES)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Names (Campus Community > Personal Information (Student) > Add/Update a Person > Biographical Details > Names)	First Name Middle Name

Note: The First Name page element can accept a maximum of 30 characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the First Name and Middle Name values from the Primary Name record.
2. Derive as NULL.

Fundability Code (FUNDCODE)

Return: ITT

Entity: Student

Pages Used:

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Page	Page Element
Program HESA Data	FUNDCODE
Plan HESA Data	FUNDCODE
Sub-Plan HESA	FUNDCODE
HESA Instance	FUNDCODE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Student.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

HESA Unique Student Identifier (HUSID)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Select External System ID records for the person with the External ID Type defined for HUSID in the HESA Types page.
2. If HUSID is not found, calculate using the following method:
   - First 2 digits: Year of entry into institution (last 2 digits of year, for example, 09 for 2009).
   - Next 4 digits: HESA Institution Identifier + 1000 (for example, QUB = 0184 which becomes 1184).

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- Next 6 digits: 6-digit reference number internally allocated by institution (this is a sequence number, institutions may need to manually increase the sequence number to avoid reusing the same number in the same year of entry).
- Last digit: Check digit

3. Derive as *NULL ERROR.*

Positive Indication that self-certification complete (INDSLFCRT)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Entry Profile	INDSLFCRT

Field Derivation Rule: If Student.COMDATE is in the current reporting period, derive a value. Otherwise, derive as *NULL ERROR.*

Derivation Step:

1. Derive from the Entry Profile page.
2. Use default.
3. Derive as *NULL ERROR.*

The system always returns a value, because the inclusion condition is always met and while selecting students for the extract, the system considers only those students for whom COMDATE is between reporting period start and end dates.

ITT Initiatives (INITIATIVES-ITT, INITIATIVES-ITT2)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data (Program Instance HESA Data)	INITIATIVES-ITT, INITIATIVES-ITT2
Plan HESA Data (Plan Instance HESA Data)	INITIATIVES-ITT, INITIATIVES-ITT2
Sub-Plan HESA (Sub-plan Instance HESA Data)	INITIATIVES-ITT, INITIATIVES-ITT2
HESA Instance	INITIATIVES-ITT, INITIATIVES-ITT2

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Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. If Instance.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Do not derive a value and leave the field blank.

Independent Safeguarding Authority Registration Number (ISANUM)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Determine from the External System ID records for the person with the External ID Type defined for ISANUM in the HESA Types page.
2. Do not derive a value and leave the field blank.

ITT Qualification Aim (ITTAIM)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data	ITTAIM
Plan HESA Data	ITTAIM
Sub-Plan HESA	ITTAIM

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

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1. Use constant.
2. If subplan is being reported, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

Start Date of ITT Course (ITTCOMDATE)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
HESA Instance	ITTCOMDATE

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive as the same value as Student.COMDATE.

ITT Phase/Scope (ITTPHSC)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data	ITTPhase/Scope
Plan HESA Data	ITTPhase/Scope
Sub-Plan HESA	ITTPhase/Scope
HESA Instance	ITTPhase/Scope

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

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1. Use constant.
2. Derive from the HESA Instance page.
3. Derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

ITT Schemes (ITTSCHMS)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data	ITTSCHMS
Plan HESA Data	ITTSCHMS
Sub-Plan HESA	ITTSCHMS
HESA Instance	ITTSCHMS

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. Derive from the Sub-Plan HESA page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as *NULL ERROR.*

Mode of Study (MODE)

Return: ITT

Entity: Student

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Pages Used:

Page	***Page Element***
Program Offering/Year HESA	MODE (Program Year HESA Data group box)
Plan Offering/Year HESA	MODE (Plan Year HESA Data group box)
Sub-Plan Offering/Year HESA	MODE (Sub-Plan Year Data group box)
Student Program	Program Action Action Reason
Student Program	Acad Load
HESA Instance	MODE
Mode of Study (Records and Enrollment > HESA Reporting > Codes and Mappings > Code Mappings > Mode of Study)	HESA Mode of Study
HESA Action Reasons	Change of Mode Mapping

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Select the Student Program record that has Program Action/Reason values mapped to a HESA Mode in the HESA Action Reasons page. Derive the mapped HESA mode value.

   If the derived value is *73* or *74,* convert *73* to *63* and *74* to *64.*

   If the derived value is 01, 12, 13, 14, 23, 24 or 25 (that is, a sandwich placement year), 43, 65, 66, 67, 68, 69, then convert as *01.*

   If the derived value is 02, derive as *02*.

   If the derived value is 31, 32, 33, 34, 35, 36, 37, 38, 39, 44, then convert as *31.*
3. Select the academic load from the Student Program record. Derive the mapped HESA code for the selected academic load from the Mode of Study page.

   If the derived value is *73* or *74,* convert *73* to *63* and *74* to *64.*

   If the derived value is 01, 12, 13, 14, 23, 24 or 25 (that is, a sandwich placement year), 43, 65, 66, 67, 68, 69, then convert as *01.*

   If the derived value is 02, derive as *02*.

   If the derived value is 31, 32, 33, 34, 35, 36, 37, 38, 39, 44, then convert as *31.*
4. Derive as *NULL ERROR.*

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Major Source of Tuition Fees (MSTUFEE)

Return: ITT

Entity: Student

Pages Used:

Page	*Page Element*
Program HESA Data	MSTUFEE
Program Offering/Year HESA	MSTUFEE (Program Offering HESA Data group box)
Plan HESA Data	MSTUFEE
Plan Offering/Year HESA	MSTUFEE (Plan Offering HESA Data group box)
Sub-Plan HESA	MSTUFEE
Sub-Plan Offering/Year HESA	MSTUFEE (Sub-Plan Offering HESA Data group box)
HESA Instance	MSTUFEE

Field Derivation Rule: If Student.TTCID = G or Q, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Student.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance.
4. If Student.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Derive as *NULL ERROR*.

Nationality (NATION)

Return: ITT

Entity: Student

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Pages Used:

Page	***Page Element***
Person HESA Data	NATION
Citizenship and Passport (Campus Community , Personal Information (Student), Identification (Student), Citizenship, Citizenship and Passport)	Country

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Select person citizenship records and retrieve the related two-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL). If a mapping exists in the HESA Nationality Code page for the Campus Solutions Country code, use the mapped HESA value else use the COUNTRY_2CHAR value.

   If a single record exists, derive the Campus Solutions country code or HESA country code.
3. If multiple person citizenship records are found and a record has a value of *GB,* derive as *GB.*
4. If multiple records are found, and none have the *GB* country value but a minimum one record has a country value that is marked as European Union (EU) country then derive the EU country. If there are multiple EU countries report the one with the lowest alphabetic HESA code. Note that the PS_COUNTRY_TBL contains an indicator (EU_MEMBER_STATE) to specify if the country is a member of the EU.
5. If multiple records are found and none have the UK or EU value, select the lowest alphabetic code
6. Use default.
7. Derive as NULL.

In most cases, you can use the Campus Solutions two-character country code to report the NATION value. However, some Campus Solutions country codes are not valid for HESA reporting. For example, the Campus Solutions Cyprus code (CY) cannot be reported. Cyprus has to be reported as *XA, XB,* or *XC.* In these cases, you must use the Nationality code mapping page to ensure the correct NATION values are reported to HESA.

National Identity (NATIOND)

Return: Student Record

Entity: Student

Page Used:

Page	***Page Element***
Person HESA Data	NATIOND

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Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default.
3. Derive as NULL.

National Identity (NATIOND2)

Return: Student Record

Entity: Student

Page Used:

Page	*Page Element*
Person HESA Data	NATIOND2

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Person HESA Data page.
2. Use default.
3. Derive as NULL.

National Insurance Number (NIN)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Determine from the External System ID records for the person with the External ID Type defined for NIN in the HESA Types page.
2. Do not derive a value and leave the field blank.

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Email Addresses (NQTEMAIL)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
Electronic Addresses	Email Address (preferred)

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from preferred email address defined for the student.
2. Derive as NULL.

Student Instance Identifier (NUMHUS)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
HESA Instance	Instance Identifier Linked Career Linked Career Number Academic Career Student Career Nbr

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from HESA Instance page as Instance Identifier.
2. Derive from HESA Instance page as Linked Career + Linked Career Number.
3. Derive from HESA Instance page as Academic Career + Student Career Nbr, for example, UGRD1.

Institution's Own Identifier for Student (OWNSTU)

Return: ITT

Entity: Student

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Pages Used: None

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Derive as EMPLID.

Apprenticeship Start Date (PGAPPSTDT)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data (Program Instance HESA Data)	PGAPPSTDT
Plan HESA Data (Plan Instance HESA Data)	PGAPPSTDT
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	PGAPPSTDT
HESA Instance Data	PGAPPSTDT

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. Use the value from HESA Instance Data.
2. If COURSEID is based on a sub-plan, use the value from Sub-Plan Instance HESA Data.
3. Derive the value from Plan Instance HESA Data.
4. Derive the value from Program Instance HESA Data
5. Use the default value.
6. Derive as null.

PGCE Class of Undergraduate Degree (PGCECLSS)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Entry Profile	PGCECLSS

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Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period
- Student.ITTAIM = 110,113, 020, 027 or 031

Derive as *NULL ERROR* if the conditions are not met.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Derive as *NULL ERROR.*

PGCE Subject of Undergraduate Degree (PGCESBJ)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Entry Profile	PGCESBJ PGCESBJ2 PGCESBJ3

Field Derivation Rule: Derive a value if the following conditions are met:

- Student.COMDATE is in the current reporting period
- Student.ITTAIM = 110,113, 020, 027 or 031

Derive as *NULL ERROR* if the conditions are not met.

Derivation Steps:

1. Use constant to create a single PGCESBJ field.
2. Derive from the Entry Profile page.
3. Use default to create a single PGCESBJ field.
4. Derive a single PGCESBJ field as *NULL ERROR* .

Note: The system can derive up to three values. Each of the values is included as a separate PGCESBJ field in the XML file.

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Immediately Prior Surname (PSURNAME)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Surname

Field Derivation Rule: If the student has at least one Instance with REDUCEDI = 00, 01, or 04 derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive the previous Last Name from the Primary Name Type History table. This is done by finding the most recent end dated record in which last name is different from the current one.
2. Do not derive a value and leave the field blank.

Qualification Aim (QLAIM)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
Program HESA Data	QLAIM
Plan HESA Data	QLAIM
Sub-Plan HESA	QLAIM

Field Derivation Rule: Derive a value if Student.ITTAIM = 202.

Derivation Steps:

1. Use constant.
2. If a sub-plan is reported, derive value from Sub-Plan HESA page.
3. Derive value from Plan HESA Data page.
4. Derive value from Program HESA Data page.
5. Use default.
6. Derive as NULL ERROR.

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Reason for Ending Instance (RSNEND)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Student Program	Program Action Action Reason
HESA Action Reasons	Reason for Ending Instance Mapping

Field Derivation Rule: If Student.ENDDATE is completed, derive a value. Otherwise, derive as *NULL ERROR.*

Derivation Steps:

1. Derive from the HESA Instance page.
2. If the most recent effective dated Student Program record has Program Action/Reason values mapped to a HESA Reason for Ending Instance code on the HESA Action Reasons page, then derive the mapped HESA code value.
3. Derive as *NULL ERROR.*

School Direct Employing School (SDEMPLOY)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data (Program Instance HESA Data)	SDEMPLOY
Plan HESA Data (Plan Instance HESA Data)	SDEMPLOY
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	SDEMPLOY
HESA Instance Data	SDEMPLOY

Field Derivation Rule: If all the following conditions are met, derive a value:

- Student.ENTRYRTE = 03
- Student.MODE is not 63 or 64

All School Direct trainees should be associated with a lead school. When the lead school does not have a unique reference number (URN), these generic codes are used:

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- 900000 — Establishments outside England and Wales
- 900010 — Not applicable nor available

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance Data.
3. If COURSEID is based on a sub-plan, derive from Sub-Plan Instance HESA Data.
4. Derive from Plan Instance HESA Data.
5. Derive from Program Instance HESA Data.
6. Use default.
7. Derive as *NULL ERROR*.

School Direct Lead School (SDLEAD)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data (Program Instance HESA Data)	SDLEAD
Plan HESA Data (Plan Instance HESA Data)	SDLEAD
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	SDLEAD
HESA Instance Data	SDLEAD

Field Derivation Rule: If all the following conditions are met, derive a value:

- Student.ENTRYRTE = 02 or 03
- Student.MODE is not 63 or 64

All School Direct trainees should be associated with a lead school. When the lead school does not have a unique reference number (URN), these generic codes are used:

- 900000 — Establishments outside England and Wales
- 900010 — Not applicable nor available

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance Data.

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3. If COURSEID is based on a sub-plan, derive from Sub-Plan Instance HESA Data.
4. Derive from Plan Instance HESA Data.
5. Derive from Program Instance HESA Data.
6. Use default.
7. Derive as *NULL ERROR*.

Service Leavers (SERLEAVE)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
HESA Instance Data	SERLEAVE

Dependant Fields: COMDATE, ITTCOMDATE

Field Derivation Rule: Derive if either COMDATE or ITTCOMDATE is after 2018-07-31. If not, derive as null.

Derivation Steps:

1. Derive the value from the HESA Instance Data page.
2. Use the default.
3. Derive as null.

Sex Identifier (SEXID)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
Biographical Details (Campus Community , Personal Information (Student), Add/Update a Person, Biographical Details)	Gender
Gender (Records and Enrollment, HESA Reporting, Codes and Mappings, Code Mappings, Gender)	HESA Identifier

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Page	Page Element
Campus Community, Personal Information, Add/ Update a Person, HESA Student Data Campus Community, Personal Information, Add/Update a Person, HESA Restricted Data	SEXID

Field Derivation Rule: Include for all Student entities.

Derivation Step:

1. Derive from Person HESA Data.
2. Select the Gender value from the Biographical History record. Derive as the mapped HESA value for the selected Gender value.
3. If no mapping is found, then derive as
   - If the gender value is Male, derive as *1*.
   - If the gender value is Female, derive as *2*.
4. Use default.
5. Derive as *NULL ERROR*.

Family Name on 16th Birthday (SNAME16)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note: The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Last Name value from the Primary Name record. The last name must have a Type of Name value that corresponds with the Name Type set for SNAME16 on the HESA Types page.
2. Do not derive a value and leave the field blank.

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Expected Length of Study (SPLENGTH)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data	SPLENGTH
Program Offering/Year HESA	SPLENGTH (Program Offering HESA Data group box)
Plan HESA Data	SPLENGTH
Plan Offering/Year HESA	SPLENGTH (Plan Offering HESA Data group box)
Sub-Plan HESA	SPLENGTH
Sub-Plan Offering/Year HESA	SPLENGTH (Sub-Plan Offering HESA Data group box)
HESA Instance	SPLENGTH

Field Derivation Rule: Include for all Student entities.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.
2. Derive from the HESA Instance page.
3. If Student.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session and Campus are all blank are considered.
4. If Student.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.
5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session and Campus are all blank are considered.
6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Do not derive a value, leave the field blank and set ReasonForNull = *9* .

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Family Name (SURNAME)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
Names (Campus Community, Personal Information (Student), Add/Update a Person, Biographical Details, Names)	Last Name

Note: The Last Name page element can accept a maximum of thirty characters.

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Last Name value from the Primary Name record.
2. Derive as *NULL ERROR*.

Title (TITLE)

Return: ITT

Entity: Student

Page Used:

Page	*Page Element*
Names (Campus Community > Personal Information (Student) > Add/Update a Person > Biographical Details > Names)	Name Title

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Use the Name Title value from the Primary Name record.
2. Do not derive a value, leave the field blank, and set ReasonForNull = *9*.

Teacher Reference Number (TREFNO)

Return: ITT

Entity: Student

Page Used:

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Page	Page Element
External System ID	External System ID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for TREFNO in the HESA Types page.
2. Use default.
3. Do not derive a value and leave the field blank.

Teacher Training Course (TTCID)

Return: ITT

Entity: Student

Pages Used:

Page	Page Element
Program HESA Data	TTCID
Plan HESA Data	TTCID
Sub-Plan HESA	TTCID

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Unique Learner Number (ULN)

Return: ITT

Entity: Student

Page Used:

Page	Page Element
External System ID	External System ID

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Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Select External System ID records for the person with the External ID Type defined for ULN in the HESA Types page.

   Validate the derived value using the checksum method. For information on the checksum method, refer to the Notes section for the ULN field available on the HESA website.

2. Do not derive a value and leave the field blank.

Units of Length (UNITLGTH)

Return: ITT

Entity: Student

Pages Used:

Page	***Page Element***
Program HESA Data	UNITLGTH
Program Offering/Year HESA	UNITLGTH (Program Offering HESA Data group box)
Plan HESA Data	UNITLGTH
Plan Offering/Year HESA	UNITLGTH (Plan Offering HESA Data group box)
Sub-Plan HESA	UNITLGTH
Sub-Plan Offering/Year HESA	UNITLGTH (Sub-Plan Offering HESA Data group box)
HESA Instance	UNITLGTH

Field Derivation Rule: Include for all Student entities.

Bundle 52. Updated steps 3 and 5

Derivation Steps:

1. Use constant.

2. Derive from the HESA Instance page.

3. If Student.COURSEID is based on a subplan, derive from the Sub-Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session and Campus are all blank are considered.

4. If Student.COURSEID is based on a subplan, derive from the Sub-Plan HESA page.

5. Derive from the Plan Offering/Year HESA page for the academic load of the student instance. Only records where Offering Start Term, Offering Start Session and Campus are all blank are considered.

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6. Derive from the Plan HESA Data page.
7. Derive from the Program Offering/Year HESA page for the academic load of the student instance.
8. Derive from the Program HESA Data page.
9. Use default.
10. Do not derive a value, leave the field blank and set ReasonForNull = *9*.

Year of Program (YEARPRG)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
HESA Instance	Year of Program

Field Derivation Rule: Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR*.

Year of Student on This Instance (YEARSTU)

Return: ITT

Entity: Student

Page Used:

Page	***Page Element***
HESA Instance	Year of Student

Include for all Student entities.

Derivation Steps:

1. Derive from the HESA Instance page.
2. Use default.
3. Derive as *NULL ERROR*.

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ITT Return: Placement

The ITT Return Placement entity depends on the Student entity.

The Create Extract process creates the extract records if you select the Include Student Entities check box on the Create Extract Data page. If you do not select Retain Data from Previous Run, existing extract records are deleted regardless of their status.

The process creates up to five Placement entities for each Student entity based on the ITT Placement records defined for the HESA Instance Data record. Only records with a Start Date in the reporting period are reported.

If the conditions are not met, an ITT Placement entity is not required and the process skips to the next instance.

Note: In the Student Return, ITT Placement is only reported where ENTRYRTE = 01. In the ITT Return, ENTRYRTE allows a subset of codes: 01 (Provider-led), 02 (School Direct tuition fee), 03 (School Direct salaried), 09 (Undergraduate Opt-in).

Placement School (PLMNTSCH)

Return: Student Record

Entity: ITT Placement

Page Used:

Page	*Page Element*
HESA Instance (ITT Placement region)	School URN

Field Derivation Rule: Include for all Instance entities.

Derivation Steps: Derive value from HESA Instance page.

Number of days Spent in Placement School (PLMNTDYS)

Return: Student Record

Entity: ITT Placement

Page Used:

Page	*Page Element*
HESA Instance (ITT Placement region)	Days

Field Derivation Rule: Include for all Instance entities.

Derivation Steps: Derive value from HESA Instance page.

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ITT Return: Course Subject Entity

The Create Extract process creates a maximum of three Course Subject entity records for each Student entity.

Subject of ITT Course (SBJCA)

Return: ITT

Entity: Course Subject

Pages Used:

Page	***Page Element***
Program HESA Data	HESA Subject
Plan HESA Data	HESA Subject
Sub-Plan HESA	HESA Subject

Field Derivation Rule: Include for all Course Subject entities.

Derivation Steps:

1. Use constant.
2. Derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR.*

For steps 2, 3, or 4, the process:

- Chooses the record that has the ITT Subject check box selected.
- Chooses the record with the greatest percentage, if multiple records have the ITT Subject check box selected.
- Chooses the first record in the alphabetical code order, if multiple records have the ITT Subject check box selected and have the same percentage.

ITT Return: Previous Qualification

A Previous Qualification entity is created if the following conditions are met:

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- Student.COMDATE is in the current reporting period
- Any one of the following conditions is true:
  - Student.QLAIM = 020, 021, or 031
  - Student.ENTRYRTE = 04, 05, or 08
  - Student.TTCID = 1 and Student.ITTAIM = 201

The most recent External Education Degree record that is associated with the current reporting period and whose status is *Complete* is used in the derivation.

Note: While five entities are allowed by the schema, only a single entry is created because only one value can be recorded for FIRSTDEG, PGCECLSS, and PGCESBJ in HESA Entry Profile.

Bursary Flag (BURSFLAG)

Return: ITT

Entity: Previous Qualification

Pages Used:

Page	***Page Element***
Entry Profile	BURSFLAG

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Use constant.
2. Derive from the Entry Profile page.
3. Use default.
4. Derive as NULL.

Previous Degree Country (DEGCTRY)

Return: ITT

Entity: Previous Qualification

Pages Used:

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Page	Page Element
External Organization Location (Campus Community >Organization >Create/Maintain Organizations >Organization Locations >Location Details >Location History)	Country

Field Derivation Rule: Derive a value if Student.DEGEST does not exist.

Derivation Steps:

1. Derive from the External Organization Location page.

   Select the most recent External Education Organization record with a Degree status of complete associated with the current reporting period. Select the most recent effective dated location record, if there are multiple records.

   It is possible for the Ext Org to have multiple Location records with the same effective date. In this case, select the record with the lowest Location ID to determine the country.

   Use the mapping on the Nationality page to derive as the mapped HESA Nationality code. Otherwise, derive as the COUNTRY_2CHAR value if the mapping does not exist.

2. Use default.

3. If COMDATE is in the reporting period and QLAIM = 020, 021, or 031, derive as NULL ERROR.

4. Derive as NULL.

The normal two-character GB code is not valid for DEGCTRY. If the value ’GB’ is derived, the system changes GB to the valid code XK (United Kingdom, not otherwise specified).

Previous Degree End Date (DEGENDDT)

Return: ITT

Entity: Previous Qualification

Pages Used:

Page	Page Element
Courses and Degrees (Student Admissions >Application/ Transcript Loads >Education >Courses and Degrees)	Degree Date

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete that is associated with the current reporting period. Derive from the Courses and Degrees page for the selected record.

2. Use default.

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3. If COMDATE is in the reporting period and and QLAIM = 020, 021, or 031, derive as NULL ERROR.

4. Derive as NULL.

Previous Degree Establishment (DEGEST)

Return: ITT

Entity: Previous Qualification

Pages Used:

Page	***Page Element***
Student Admissions >Application Maintenance >Maintain Applications >Application Program Data At the bottom of the page, Transfer to Education, then click Go.	
Region (Campus Community >Organization > Create/ Maintain Organizations > Organization Table >Region	HESA Degree Establishment

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Select the most recent External Education Organization record associated with the current reporting period. Derive from the Region page for the selected record. Convert using the two-character code (COUNTRY_2CHAR) from the Country table (PS_COUNTRY_TBL).

2. Use default.

3. Derive as NULL.

Previous Degree Length in Years (DEGLENGTH)

Return: ITT

Entity: Previous Qualification

Pages Used:

Page	***Page Element***
Student Admissions >Application Maintenance >Maintain Applications >Application Program Data At the bottom of the page, Transfer to Education, then click Go.	From Date Degree Date

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

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1. Select the most recent External Education Degree record with a Degree status of complete that is associated with the current reporting period. Derive as Degree Date minus From Date from the selected record. The number of days is converted to years and rounded to the nearest year.
2. Use default.
3. If COMDATE is in the reporting period and and QLAIM = 020, 021, or 031, derive as NULL ERROR.
4. Derive as NULL.

Previous Degree Start Date (DEGSTDT)

Return: ITT

Entity: Previous Qualification

Pages Used:

Page	***Page Element***
Student Admissions >Application Maintenance >Maintain Applications >Application Program Data At the bottom of the page, Transfer to Education, then click Go.	From Date

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Select the most recent External Education Degree record with a Degree status of complete that is associated with the current reporting period. Derive from the Education page for the selected record.
2. Use default.
3. If COMDATE is in the reporting period and and QLAIM = 020, 021, or 031, derive as NULL ERROR.
4. Derive as NULL.

Previous Degree Type (DEGTYPE)

Return: ITT

Entity: Previous Qualification

Pages Used:

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Page	Page Element
Student Admissions >Application Maintenance >Maintain Applications >Application Program Data At the bottom of the page, Transfer to Education, then click Go.	
Setup SACR >Foundation Tables >Academic Structure >Degree Table	HESA Degree Type

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Derive the Previous Degree Type by mapping the most recent External Education Degree record with a Degree status of complete from the External degree region to the Degree Type value from the Degree Table.
2. Use default.
3. If COMDATE is in the reporting period and and QLAIM = 020, 021, or 031, derive as NULL ERROR.
4. Derive as NULL.

First Degree Flag (FIRSTDEG)

Return: ITT

Entity: Previous Qualification

Pages Used: None

Page	Page Element
Entry Profile	FIRSTDEG

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Derive value from the Entry Profile page.
2. If DEGTYPE is in the range 001 to 098, or is 400 or 402, derive as *01*.
3. Derive as *02*.

PGCE Class of Undergraduate Degree (PGCECLSS)

Return: ITT

Entity: Previous Qualification

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Pages Used:

Page	Page Element
Entry Profile	PGCECLSS

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Use constant.
2. Derive value from Entry Profile page.
3. Use default.
4. If COMDATE is in the reporting period and and QLAIM = 020, 021, or 031, derive as NULL ERROR.
5. Derive as NULL.

PGCE Subject of Undergraduate Degree (PGCESBJ, PGCESBJ2, PGCESBJ3)

Return: ITT

Entity: Previous Qualification

Pages Used:

Page	Page Element
Entry Profile	PGCESBJ PGCESBJ2 PGCESBJ3

Field Derivation Rule: Include for all Previous Qualification entities.

Derivation Steps:

1. Use constant to derive a single PGCESBJ field.
2. Derive values from Entry Profile page.
3. Use default to derive a single PGCESBJ field.
4. If COMDATE is in the reporting period and and QLAIM = 020, 021, or 031, derive as a single PGCESBJ field as NULL ERROR.
5. Derive as NULL.

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Note: The system can derive up to three values. Each of the values is included as a separate PGCESBJ field in the XML file.

Data Futures Return: Curriculum Accreditation Entity

Bundle 52. Updated to indicate dependency on Course Delivery for entity selection

Curriculum accreditation extract records are created if the Include Course Entities on the Create Extract Data page is selected. For each Course Delivery entity in the extract for the return with an active status:

- If the CourseDelivery.COURSEID is derived from a sub-plan, an entity is created for each eligible record when:
  - at least one eligible accreditation is defined for the sub-plan and has an accreditation ID code. The derivation step for ACCREDITATIONID is set to 1.
  - at least one eligible accreditation is defined for the parent plan and has an accreditation ID code. The derivation step for ACCREDITATIONID is set to 2.
  - the parent plan is associated with an academic program and at least one eligible accreditation exists for the program and has an accreditation ID. The derivation step for ACCREDITATIONID is set to 3.
- If the CourseDelivery.COURSEID is derived from a plan, an entity is created for each eligible record when:
  - at least one eligible accreditation is defined for the plan and has an accreditation code. The derivation step for ACCREDITATIONID is set to 2.
  - the parent plan is associated with an academic program and at least one eligible accreditation for the program and has an accreditation ID. The derivation step for ACCREDITATIONID is set to 3.

Accreditation Identifier (ACCREDITATIONIDCA)

Return: Data Futures

Entity: Curriculum Accreditation

Pages Used:

Page	*Page Element*
Program HESA Data — Accreditation	Accreditation ID
Plan HESA Data — Accreditation	Accreditation ID
Sub-Plan HESA Data — Accreditation	Accreditation ID

Field Derivation Rule: Include for all entities

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Derivation Steps:

1. If Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Data Futures Return: Course Delivery Reference Entity

Bundle 52. New

This entity reports the same values reported in Course.OWNCOURSEID in Student Return and KISCourse.UCASPROGID and CourseLocation.UCASCOURSEID in the Unistats return. Course Identifier extract records are created if the Include Course Entities check box has been selected.

OWNCOURSEID appears in HESA Data and Sub-Plan HESA Data. The other fields appear in KIS Course Data.

Extract records are created if the ‘Include Course entities’ parameter has been selected. For each Course Delivery entity in the extract for the return with status of ACTIVE:

- If the CourseDelivery.COURSEID is derived from a Sub-Plan:
  - If OWNCOURSEID is defined for the Sub-Plan Offering, Sub-Plan, or parent Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 01.
  - If UCASPROGID is defined for the Sub-Plan Offering, Sub-Plan, or parent Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 02.
  - If UCASCOURSEID is defined for the Sub-Plan Offering, Sub-Plan, or parent Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 03.
  - If UCASCOURSEID2 is defined for the Sub-Plan Offering, Sub-Plan, or parent Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 03.
  - If UCASCOURSEID3 is defined for the Sub-Plan Offering, Sub-Plan, or parent Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 03.
  - If none of the fields are defined for Sub-Plan Offering, Sub-Plan, or Plan, entities aren’t created.
- If the CourseDelivery.COURSEID is derived from a Plan:
  - If OWNCOURSEID is defined for the Plan Offering or Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 01.
  - If UCASPROGID is defined for the Plan Offering or Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 02.
  - If UCASCOURSEID is defined for the Plan Offering or Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 03.

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- If UCASCOURSEID2 is defined for the Plan Offering or Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 03.
- If UCASCOURSEID3 is defined for the Plan, a Course Identifier entity is created with COURSEDELREFRNCIDTYPE = 03.
- If none of the fields are defined for the Plan, entities aren't created.

Course Delivery Reference Identifier (COURSEDELREFRNCID)

Return: Student Record

Entity: Course Delivery Reference

Pages Used:

Page	***Page Element***
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	OWNCOURSEID
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASPROGID
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASCOURSEID
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASCOURSEID2
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASCOURSEID3

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Field Derivation Rule: Include for all entities

Derivation Steps:

1. If Course entity is based on a sub-plan, derive Code from the Sub-Plan/Offering HESA Data page.
2. If Course entity is based on a sub-plan, derive Code from the Sub-Plan HESA page.
3. Derive Code from the Plan/Offering HESA Data page.
4. Derive Code from the Plan HESA Data page.

Course Delivery Reference Identifier Type (COURSEDELREFRNCIDTYPE)

Return: Student Record

Entity: Course Delivery Reference

Pages Used:

Page	***Page Element***
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	OWNCOURSEID
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASPROGID
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASCOURSEID
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASCOURSEID2

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Page	Page Element
Plan HESA Data Plan/Offering HESA Data Sub-Plan HESA Sub-Plan/Offering HESA Data	UCASCOURSEID3

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If Course entity is based on a sub-plan, derive from the Sub-Plan/Offering HESA Data page.
   - OWNCOURSEID = 01
   - UCASPROGID = 02
   - UCASCOURSEID, UCASCOURSEID2, UCASCOURSEID3 = 03
2. If Course entity is based on a sub-plan, derive from the Sub-Plan HESA page.
   - OWNCOURSEID = 01
   - UCASPROGID = 02
   - UCASCOURSEID, UCASCOURSEID2, UCASCOURSEID3 = 03
3. Derive from the Plan/Offering HESA Data page.
   - OWNCOURSEID = 01
   - UCASPROGID = 02
   - UCASCOURSEID, UCASCOURSEID2, UCASCOURSEID3 = 03
4. Derive from the Plan HESA Data page.
   - OWNCOURSEID = 01
   - UCASPROGID = 02
   - UCASCOURSEID, UCASCOURSEID2, UCASCOURSEID3 = 03

Data Futures Return: Course Delivery Entity

Bundle 52. Updated to reference Course Delivery rather than Course entities.

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This entity is used to report each distinct delivery of a course based on a Start Date and Expected End Date.

Plan and Sub-Plan Offering HESA Data records are selected from the most recent non-future effective dated record, that is, effective date is on or before the reporting period end date to create Course Delivery entities. Only records with an Offering Start Term are considered.

As with Course entities, initially all records are selected before the data is compared with what has already been reported to HESA. This is to determine if the record should be returned as a new record or is an update to an existing record. This means that older Course Delivery records continue to be extracted unless the offering is removed from the most recent effective dated record in Plan or Sub-Plan.

Course Delivery extract records are created if the Include Course Entities check box has been selected.

Bilingual ITT Marker (BITTM)

Bundle 52. Moved from Course Entity; additional steps added to derive values from Plan Offering and Sub-Plan Offering.

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	*Page Element*
Program HESA Data	BITTM
Plan HESA Data	BITTM
Plan Offering HESA Data	BITTM
Sub-Plan HESA Data	BITTM
Sub-Plan Offering HESA Data	BITTM

Field Derivation Rule: Derive a value if all the conditions are met:

- Country = Scotland or Northern Ireland
- CourseDelivery.TTCID = 01 or 02

Derivation Steps:

1. Use constant.
2. If COURSEID is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If Course entity is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. Derive from the Plan Offering HESA Data page.
5. Derive from the Plan HESA Data page.

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6. Derive from the Program HESA Data page.
7. Use default.
8. Derive as NULL ERROR.

Bridging Course (BRIDGECRS)

Bundle 52. Updated field name; added the Qualification.QUALCAT condition to the Field Inclusion Rule

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	***Page Element***
Program HESA Data	BRIDGE
Plan HESA Data	BRIDGE
Plan Offering HESA Data	BRIDGE
Sub-Plan HESA Data	BRIDGE
Sub-Plan Offering HESA Data	BRIDGE

Field Derivation Rule: If the related Qualification.QUALCAT = H0018, I0012, J0011, or C0008, derive a value.

Derivation Steps:

1. Use constant.
2. If COURSEID is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If COURSEID is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. Derive from the Plan Offering HESA Data page.
5. Derive from the Plan HESA Data page.
6. Derive from the Program HESA Data page.
7. Use default.
8. Derive as NULL ERROR.

Closed Course (CLSDCRS)

Return: Data Futures

Entity: Course Delivery

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Pages Used:

Page	***Page Element***
Program HESA Data	CLSDCRS
Plan HESA Data	CLSDCRS
Plan Offering HESA Data	CLSDCRS
Sub-Plan HESA Data	CLSDCRS
Sub-Plan Offering HESA Data	CLSDCRS

Field Derivation Rule: Include where country = ENGLAND

Derivation Steps:

1. Use constant.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
5. Derive from the Plan HESA Data page.
6. Derive from the Program HESA Data page.
7. Use default.
8. Derive as NULL ERROR.

Course Delivery Type (COURSEDELIVERYTITLE)

Bundle 52. Updated with additional steps to derive Course Title in Plan and Sub-Plan HESA because Course.COURSENAME has been removed.

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	***Page Element***
Plan HESA Data	Course Title
Plan Offering HESA Data	Offering Title
Sub-Plan HESA	Course Title
Sub-Plan Offering HESA Data	Offering Title

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Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
2. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
3. If the Course entity is based on a sub-plan, derive as:
   - Course Title from Sub-Plan HESA Data page (if defined)
   - Combination of Plan and Sub-Plan descriptions separated by a space
4. Derive from Academic Plan.
   - Course Title from the Plan HESA Data page (if defined)
   - Plan description

Course Delivery Mode Type (COURSEDELMODETYPE)

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	***Page Element***
Plan Offering HESA Data	Academic Load
Sub-Plan Offering HESA Data	Academic Load

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive Academic Load on the Sub-Plan Offering HESA Data page mapped to mode type.
2. If parent Course is based on a Plan, derive Academic Load on the Plan Offering HESA Data page mapped to mode type.
3. Derive as NULL ERROR.

Course Delivery Start Date (COURSESTARTDATE)

Return: Data Futures

Entity: Course Delivery

Pages Used:

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Page	Page Element
Plan Offering HESA Data	Offering Start Term Offering Start Session COURSESTARTDATE
Sub-Plan Offering HESA Data	Offering Start Term Offering Start Session COURSESTARTDATE

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive COURSESTARTDATE on the Sub-Plan Offering HESA Data page.
2. If parent Course is based on a sub-plan, derive Begin Date for the Offering Start Session on the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive Begin Date for the Offering Start Term on the Sub-Plan Offering HESA Data page.
4. If parent Course is based on a plan, derive COURSESTARTDATE on the Plan Offering HESA Data page.
5. If parent Course is based on a plan, derive Begin Date for the Offering Start Session on the Plan Offering HESA Data page.
6. If parent Course is based on a plan, derive Begin Date for the Offering Start Term on the Plan Offering HESA Data page.

Course Delivery Type (COURSEDELTYPEID)

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	Page Element
Program HESA Data	COURSEDELTYPEID
Plan HESA Data	COURSEDELTYPEID
Plan Offering HESA Data	COURSEDELTYPEID
Sub-Plan HESA Data	COURSEDELTYPEID
Sub-Plan Offering HESA Data	COURSEDELTYPEID

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Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
5. Derive from the Plan HESA Data page.
6. Derive from the Program HESA Data page.
7. Use default.
8. Derive as NULL ERROR.

Designated Course (DESIGCRS)

Bundle 52. Updated field name

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	***Page Element***
Program HESA Data	DESIGNATED
Plan HESA Data	DESIGNATED
Plan Offering HESA Data	DESIGNATED
Sub-Plan HESA Data	DESIGNATED
Sub-Plan Offering HESA Data	DESIGNATED

Field Derivation Rule: Include where COUNTRY = England or Scotland

Derivation Steps:

1. Use constant.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
5. Derive from the Plan HESA Data page.

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6. Derive from the Program HESA Data page.
7. Use default.
8. Derive as NULL ERROR.

Expected End Date (EXPECTEDENDDATE)

Bundle 52. Added step 7 to derive as NULL ERROR because Offering End Term is updated from required to optional

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	***Page Element***
Plan Offering HESA Data	Offering End Term Offering End Session EXPECTEDENDDATE
Sub-Plan Offering HESA Data	Offering End Term Offering End Session EXPECTEDENDDATE

Field Derivation Rule: Include where COUNTRY = England or Scotland

Derivation Steps:

1. If parent Course is based on a sub-plan, derive EXPECTEDENDDATE from the Sub-Plan Offering HESA Data page.
2. If parent Course is based on a sub-plan, derive End Date for Offering End Session from the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive End Date for Offering End Term from the Sub-Plan Offering HESA Data page.
4. If parent Course is based on a Plan, derive EXPECTEDENDDATE from the Plan Offering HESA Data page.
5. If parent Course is based on a Plan, derive End Date for Offering End Session from the Plan Offering HESA Data page.
6. If parent Course is based on a Plan, derive End Date for Offering End Term from the Plan Offering HESA Data page.
7. Derive as NULL ERROR.

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Qualification Identifier (QUALID)

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	*Page Element*
Program HESA Data	Qualification ID
Plan HESA Data	Qualification ID
Plan Offering HESA Data	Qualification ID
Sub-Plan HESA Data	Qualification ID
Sub-Plan Offering HESA Data	Qualification ID

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
3. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as NULL ERROR.

Sandwich (SANDWICHCD)

Return: Data Futures

Entity: Course Delivery

Pages Used:

Page	*Page Element*
Program HESA Data	SANDWICHCD
Plan HESA Data	SANDWICHCD
Plan Offering HESA Data	SANDWICHCD
Sub-Plan HESA Data	SANDWICHCD

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Page	Page Element
Sub-Plan Offering HESA Data	SANDWICHCD

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
3. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
4. Derive from the Plan HESA Data page.
5. Derive from the Program HESA Data page.
6. Use default.
7. Derive as null.

Teacher Training Course (TTCID)

Bundle 52. Moved from Course Entity; additional steps added to derive values from Plan Offering and Sub-Plan Offering.

Return: Student Record

Entity: Course Delivery

Pages Used:

Page	Page Element
Program HESA Data	TTCID
Plan HESA Data	TTCID
Plan/Offering HESA Data	TTCID
Sub-Plan HESA	TTCID
Sub-Plan/Offering HESA Data	TTCID

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.
2. If Course entity is based on a subplan, derive from the Sub-Plan/Offering HESA Data page.
3. If Course entity is based on a subplan, derive from the Sub-Plan HESA page.

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4. Derive from the Plan/Offering HESA Data page.
5. Derive from the Plan HESA Data page.
6. Derive from the Program HESA Data page.
7. Use default.
8. Derive as *NULL ERROR.*

Data Futures Return: Course Session Entity

Bundle 52.

The logic is updated to consider the changes to Plan Year and Sub-Plan Year records to make Offering Start Term and Year Term optional rather than required. The selection from Plan Year and Sub-Plan Year is updated to only consider records where the Offering Start Term is defined.

This entity reports each distinct year for each delivery of a course based on a Start Date and Expected End Date.

Plan Year and Sub-Plan Year HESA Data records are selected from the most recent non-future effective dated record, that is, the effective date is on or before the reporting period end date to create Course Session entities.

As with Course and Course Delivery entities, initially all records will be selected before the data is compared with what has already been reported to HESA. This is to determine if the record should be returned as a new record or is an update to an existing record. This means that older Course Sessions continue to be extracted unless the Year is removed from the most recent effective dated record in Plan or Sub-Plan.

Course Session extract records are created if the Include Course Entities check box has been selected.

Attendance Weeks (ATTENDANCEWEEKS)

Return: Data Futures

Entity: Course Session

Pages Used:

Page	***Page Element***
Program HESA Data	ATTENDANCEWEEKS
Plan HESA Data	ATTENDANCEWEEKS
Plan Offering HESA Data	ATTENDANCEWEEKS
Plan Year HESA Data	ATTENDANCEWEEKS
Sub-Plan HESA Data	ATTENDANCEWEEKS

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Page	Page Element
Sub-Plan Offering HESA Data	ATTENDANCEWEEKS
Sub-Plan Year HESA Data	ATTENDANCEWEEKS

Field Derivation Rule: Include when all of these conditions are met:

- Country = England or Scotland
- COURSEDELTYPEID for the parent CourseDelivery is not 03 (fully flexible)
- CourseSession.SESSIONLOCATION is not 02 (on placement for the whole course session)

Derivation Steps:

1. If parent Course is based on a sub-plan, derive from the Sub-Plan Year HESA Data page.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. If parent Course is based on a Plan, derive from the Plan Year HESA Data page.
5. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
6. Derive from the Plan HESA Data page.
7. Derive from the Program HESA Data page.
8. Use default.
9. Derive as NULL ERROR.

Foundation (FOUNDATIONCS)

Return: Data Futures

Entity: Course Session

Pages Used:

Page	Page Element
Plan Year HESA Data	FOUNDATION
Sub-Plan Year HESA Data	FOUNDATION

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan Year HESA Data page.

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3. If parent Course is based on a Plan, derive from the Plan Year HESA Data page.
4. Use default.
5. Derive as NULL ERROR.

Funding Level (FUNDINGLEVEL)

Return: Data Futures

Entity: Course Session

Pages Used:

Page	***Page Element***
Program HESA Data	FUNDINGLEVEL
Plan HESA Data	FUNDINGLEVEL
Plan Offering HESA Data	FUNDINGLEVEL
Plan Year HESA Data	FUNDINGLEVEL
Sub-Plan HESA Data	FUNDINGLEVEL
Sub-Plan Offering HESA Data	FUNDINGLEVEL
Sub-Plan Year HESA Data	FUNDINGLEVEL

Field Derivation Rule: Include where Country = England or Northern Ireland

Derivation Steps:

1. If parent Course is based on a sub-plan, derive from the Sub-Plan Year HESA Data page.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. If parent Course is based on a Plan, derive from the Plan Year HESA Data page.
5. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
6. Derive from the Plan HESA Data page.
7. Derive from the Program HESA Data page.
8. Use default.
9. Derive as NULL ERROR.

Course Session End Date (SESSIONENDDATE)

Return: Data Futures

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Entity: Course Session

Pages Used:

Page	***Page Element***
Plan Year HESA Data	Year Term Year Session SESSIONENDDATE
Sub-Plan Year HESA Data	Year Term Year Session SESSIONENDDATE

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive SESSIONENDDATE from the Sub-Plan Year HESA Data page.
2. If parent Course is based on a sub-plan, derive End Date for the Year Session from the Sub-Plan Year HESA Data page.
3. If parent Course is based on a sub-plan, derive End Date for Year Term from the Sub-Plan Year HESA Data page.
4. If parent Course is based on a Plan, derive SESSIONENDDATE from the Plan Year HESA Data page.
5. If parent Course is based on a Plan, derive End Date for the Year Session from the Plan Year HESA Data page.
6. If parent Course is based on a Plan, derive End Date for Year Term from the Plan Year HESA Data page.

Session Location (SESSIONLOCATION)

Return: Data Futures

Entity: Course Session

Pages Used:

Page	***Page Element***
Program HESA Data	SESSIONLOCATION
Plan HESA Data	SESSIONLOCATION
Plan Offering HESA Data	SESSIONLOCATION

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Page	Page Element
Plan Year HESA Data	SESSIONLOCATION
Sub-Plan HESA Data	SESSIONLOCATION
Sub-Plan Offering HESA Data	SESSIONLOCATION
Sub-Plan Year HESA Data	SESSIONLOCATION

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive from the Sub-Plan Year HESA Data page.
2. If parent Course is based on a sub-plan, derive from the Sub-Plan Offering HESA Data page.
3. If parent Course is based on a sub-plan, derive from the Sub-Plan HESA Data page.
4. If parent Course is based on a Plan, derive from the Plan Year HESA Data page.
5. If parent Course is based on a Plan, derive from the Plan Offering HESA Data page.
6. Derive from the Plan HESA Data page.
7. Derive from the Program HESA Data page.
8. Use default.
9. Derive as NULL ERROR.

Course Session Start Date (SESSIONSTARTDATE)

Bundle 52. An additional step to derive NULL ERROR is added for cases where Year Term, Year Session, and SESSIONSTARTDATE are all not defined.

Return: Data Futures

Entity: Course Session

Pages Used:

Page	Page Element
Plan Year HESA Data	Year Term Year Session SESSIONSTARTDATE

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Page	Page Element
Sub-Plan Year HESA Data	Year Term Year Session SESSIONSTARTDATE

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive SESSIONSTARTDATE from the Sub-Plan Year HESA Data page.
2. If parent Course is based on a sub-plan, derive Begin Date for the Year Session from the Sub-Plan Year HESA Data page.
3. If parent Course is based on a sub-plan, derive Begin Date for Year Term from the Sub-Plan Year HESA Data page.
4. If parent Course is based on a Plan, derive SESSIONSTARTDATE from the Plan Year HESA Data page.
5. If parent Course is based on a Plan, derive Begin Date for the Year Session from the Plan Year HESA Data page.
6. If parent Course is based on a Plan, derive Begin Date for Year Term from the Plan Year HESA Data page.
7. Derive as NULL ERROR.

Programme Year (YEARPRG)

Return: Data Futures

Entity: Course Session

Pages Used:

Page	Page Element
Plan Year HESA Data	Year of Program
Sub-Plan Year HESA Data	Year of Program

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If parent Course is based on a sub-plan, derive from the Sub-Plan Year HESA Data page.
2. If parent Course is based on a plan, derive from the Plan Year HESA Data page.

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Data Futures Return: Module Entity

Bundle 52. New

If you select the Include Module Entities check box on the Create Extract Data page, the Create Extract process creates the Module entities. To create Module entities, the process uses the institution's Course Offering records that are active and have been set up as eligible for reporting to HESA. You must select the Report to HESA check box on the HESA Module Data page to make a course offering record eligible for HESA reporting.

If HESA Module Data records do not exist, the process does not include the course offerings in the Module entity. The process includes dummy modules in the module entity.

Note: When you run the Create Extract process, you can choose to enter the course ID or course offering number as a run parameter for testing purposes. The Create Extract process then uses the specified course ID or course offering number to create the Module entities.

If you have selected an academic career and no course offering on the Create Extract Data page, then the process selects only those course offerings that are related to the selected career.

If you have selected the Null Errors Only check box for the Include Module Entities on the Create Extract Data page, the Create Extract process selects distinct MODID values from the existing active Module extract data, where at least one field in the Module or Module Subject extract data has a Derived Value of *NULL ERROR.* The process then selects Module entity records for these MODIDs.

If you have selected the Validation Errors Only check box for the Include Module Entities, the Create Extract process first deletes any Validation Error staging records where all of the COURSEID, MODID and EMPLID fields are blank. Then, it selects distinct MODID values from the Validation Error staging table for rows where MODID is not blank and EMPLID is blank. The process selects Module entity records for these MODIDs. Note that the File Parser process removes the leading zeroes from MODID, therefore, the comparison of MODID with Course ID and Course Offering Number includes the logic to correctly match the values. The system makes an assumption that the Course Offering Number is a single digit. Finally, the Create Extract process deletes records from the Validation Error staging table where MODID is populated and EMPLID is blank.

Credit Value of Module (CRDTPTS)

Return: Data Futures

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	CRDTPTS
Catalog Data (Curriculum Management, Course Catalog, Catalog Data)	Maximum Units, Academic Progress Units, Enrollment Unit Load Calc Type

Field Derivation Rule: Include for all entities

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Derivation Steps:

1. Derive from the HESA Module Data page.
2. Select the Course Catalog record for the Course ID. If the Enrollment Unit Load Calc Type value is *Academic Progress Units,* derive from the Academic Progress Units value. If the Enrollment Unit Load Calc Type value is any other value, derive from the Maximum Units value. Round off the fractional values to the nearest whole number. This step is not performed for dummy modules.
3. Use default.
4. Derive as null.

Credit Transfer Scheme (CRDTSCM)

Return: Data Futures

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	CRDTSCM

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Module FTE (FTE)

Return: Data Futures

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	FTE

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.

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2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as *NULL ERROR.*

Level of Credit Points (LEVLPTS)

Return: Data Futures

Entity: Module

Page Used:

Page	***Page Element***
HESA Module Data	LEVLPTS
HESA Dummy Module	LEVLPTS

Field Derivation Rule: If Module.CRDTPTS is greater than zero, derive a value.

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data page.
3. Use default.
4. Derive as null.

Data Futures Return: Module Subject Entity

Bundle 52. New

If you select the Include Module Entities check box on the Create Extract Data page, the Create Extract process selects HECoS subjects from the most recent effective dated record that falls on or before the reporting period end date from the HESA Module or HESA Dummy Module page. If one or more subjects are found, Module Subject entities are created using the key structure of the Module Extract record, and the derivation step for each field is set to 2. If Module Subjects aren't found for the course offering, a Module Subject record is created using steps 1, 3, and 4.

Subject Identifier (MODSBJ)

Return: Data Futures

Entity: Module Subject

Page Used:

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Page	Page Element
HESA Module Data (HECoS Subjects)	Subject

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data — HECoS Subjects page.
3. Use Default.
4. Derive as *NULL ERROR.*

Module Proportion (MODPROPORTION)

Return: Data Futures

Entity: Module Subject

Page Used:

Page	Page Element
HESA Module Data (HECoS Subjects)	Percentage

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.
2. Derive from the HESA Module Data — HECoS Subjects page.
3. Use Default.
4. Derive as *NULL ERROR*.

Data Futures Return: Qualification Entity

Bundle 52. New

Qualification extract records are created only if the ‘Include Course entities’ parameter has been selected.

Select HESA Qualification records for the Institution where the Effective Status is Active for the most recent row, and the effective date is on or before the reporting period end date.

- If ‘Null Errors Only’ is selected for Course Entities:

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  - Select distinct QUALID values from the existing active Qualification extract data where at least one field in the Qualification, Qualification Subject, or Awarding Body Role has a derived value of NULL ERROR.
  - Restrict the selection based on the selected QUALIDs.

- If ‘Validation Errors Only’ is selected for Course Entities, all selected Qualifications are included.
- If Academic Plan or Academic Sub-Plan are selected, all selected Qualifications are included.

The QUALID is derived from the selected HESA Qualification record.

Qualification Category (QUALCAT)

Return: Data Futures

Entity: Qualification

Page Used:

Page	***Page Element***
HESA Qualification	Qualification Category

Field Derivation Rule: Include for all entities

Derivation Steps: Derive from the HESA Qualification page.

Qualification Title (QUALTITLE)

Return: Data Futures

Entity: Qualification

Page Used:

Page	***Page Element***
HESA Qualification	Qualification Title

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from the HESA Qualification page.
2. Derive as null.

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Data Futures Return: Qualification Subject Entity

Bundle 52. New

Extract records are created if the 'Include Course entities' parameter has been selected. For each QUALID in the Qualification Extract for the return with an active status, up to 5 entities are created. These are arranged in descending order of percentage, selected by Institution and QUALID from the most recent effective dated HESA Qualification record where the effective date is on or before the reporting period end date record.

Qualification ITT Specialism (QUALITT)

Return: Data Futures

Entity: Qualification Subject

Page Used:

Page	***Page Element***
HESA Qualification — HECoS Subjects	ITT Subject

Field Derivation Rule: Derive a value if one of the following conditions is met:

- Country = England and at least one associated CourseDelivery.TTCID = 01 and at least one associated Curriculum Accreditation entity exists with ACCREDITATIONID in the range 13909 to 13919
- Country = Scotland and at least one associated CourseDelivery.TTCID = 01 or 02 and at least one associated Curriculum Accreditation entity exists with ACCREDITATIONID = 06603 (GTCS Secondary)

Derivation Steps:

1. If ITT Subject is selected on the HESA Qualification – HECoS Subjects page, derive as 01.
2. Derive as null.

Qualification Proportion (QUALPROPORTION)

Return: Data Futures

Entity: Qualification Subject

Page Used:

Page	***Page Element***
HESA Qualification — HECoS Subjects	Percentage

Field Derivation Rule: Include for all entities

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Derivation Steps: Derive from the HESA Qualification page.

Qualification Subject (QUALSUBJECT)

Return: Data Futures

Entity: Qualification Subject

Page Used:

Page	*Page Element*
HESA Qualification — HECoS Subjects	Subject

Field Derivation Rule: Include for all entities

Derivation Steps: Derive from the HESA Qualification page.

Data Futures Return: Engagement Entity

Bundle 52. New

For each combination of SID and NUMHUS in the Student Registration extract records, a single Engagement entity is created. If there are multiple Student Registration extract record with different NUMREG values, one Engagement entity is created.

Any changes to field values within Engagement are reported only if a related Student Registration entity is also extracted. Instances are extracted for each reporting period while they are active.

Access Programme (ACCESSPRG)

Return: Data Futures

Entity: Engagement

Page Used:

Page	*Page Element*
Entry Profile	ACCESSPRG

Field Derivation Rule: Derive a value if all conditions are met:

- Country = Scotland
- Engagement.HIGHESTQUALOE = X0000 or X0001

Derivation Steps:

1. Derive from the Entry Profile page where the HESA Instance with the highest Registration Number (NUMREG) matches NUMHUS and Report to HESA = Y.

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2. Use default.
3. Derive as NULL ERROR.

ITT Entry Route (ENTRYRTE)

Return: Data Futures

Entity: Student Registration

Page Used:

Page	***Page Element***
Program HESA Data (Program Instance HESA Data)	ENTRYRTE
Plan HESA Data (Plan Instance HESA Data)	ENTRYRTE
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	ENTRYRTE
HESA Instance Data	ENTRYRTE

Field Derivation Rule: Derive a value if all these conditions are met:

- Country = England
- Any related CourseDelivery.TTCID = 01
- INCOMINGEXCHANGE is null for any related Student Registration entity

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance Data.
3. If Instance.COURSEID is based on a sub-plan, derive from Sub-plan Instance HESA Data.
4. Derive from Plan Instance HESA Data.
5. Derive from Program Instance HESA Data.
6. Use default.
7. Derive as NULL ERROR.

Highest Qualification on Entry (HIGHESTQUALOE)

Return: Data Futures

Entity: Engagement

Page Used:

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Page	Page Element
Entry Profile	HIGHESTQUALOE

Field Derivation Rule: Derive a value if INCOMINGEXCHANGE is null for any related Student Registration entity.

Derivation Steps:

1. Derive from the Entry Profile page where the HESA Instance with the highest Registration Number (NUMREG) matches NUMHUS and Report to HESA = Y.
2. Use default.
3. Derive as null.

Intention End Date of Engagement (INTENTIONENDDATE)

Return: Data Futures

Entity: Engagement

Page Used:

Page	Page Element
Entry Profile	INTENTIONENDDATE

Field Derivation Rule: Derive a value if INCOMINGEXCHANGE is null for any related Student Registration entity.

Derivation Steps:

1. Derive from the Entry Profile page where the HESA Instance with the highest Registration Number (NUMREG) matches NUMHUS and Report to HESA = Y.
2. Select the latest EXPECTEDENDDATE value for related Student Registration entities.
3. Derive as null.

Last School Attended (PREVIOUSPROVIDER)

Return: Data Futures

Entity: Engagement

Page Used:

Page	Page Element
Entry Profile	PREVIOUSPROVIDER

Field Derivation Rule: Derive a value if all conditions are met:

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- INTERCALATE is not 01 for any related Student Course Session entity
- INCOMINGEXCHANGE is null for any related Student Registration entity
- STUDYINTENTION is M0002, H0003, H0004, H0005, I0001, I0007, J0000, J0001, J0002, J0003, C0000 or C0001 *OR* • STUDYINTENTION is null and Qualification.QUALCAT is M0002, H0003, H0004, H0005, I0001, I0007, J0000, J0001, J0002, J0003, C0000 or C0001

Derivation Steps:

1. Derive from Entry Profile page.
2. Use default.
3. Derive as NULL ERROR.

Study Intention (STUDYINTENTION)

Return: Data Futures

Entity: Engagement

Page Used:

Page	***Page Element***
Entry Profile	STUDYINTENTION

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from the Entry Profile page where the HESA Instance with the highest Registration Number (NUMREG) matches NUMHUS and Report to HESA = Y.
2. Derive as null.

UCAS Scheme Code (UCASSCHEMECODE)

Return: Data Futures

Entity: Engagement

Page Used:

Page	***Page Element***
Application Data (Student Admissions > Application Maintenance > Maintain Applications > Application Data)	External Application Number
Entry Profile	UCASSCHEMECODE

Field Derivation Rule: Include for all entities

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Derivation Steps:

1. Derive from Entry Profile page.
2. Reference the Student Program record for the related Instance with the highest Registration Number to find the admission application number (ADM_APPL_NBR), which is used to reference the Admissions Data record (ADM_APPL_DATA) to find the External Application Number (EXT_ADM_APPL_NBR) that holds the UCAS Application Code plus Choice Number for UCAS applications.

   If the External Application Number is not null and is a UCAS number, that is, a 4-character application code that begins with ‘UC’ plus ‘-‘ plus a single-digit choice number (for example, UC01-1), then the UCAS value minus the ‘-‘ and choice elements is derived (for example, UC01). Only values beginning with ‘UC’ are derived.
3. Derive as null.

Year Left Last Provider (YRLPPROV)

Return: Data Futures

Entity: Engagement

Page Used:

Page	***Page Element***
Entry Profile	YRLPPROV

Field Derivation Rule: Derive a value if Country = Scotland

Derivation Steps:

1. Derive from Entry Profile page.
2. Use default.
3. Derive as null.

Data Futures Return: Student Registration Entity

Bundle 52. New

Entities are created for all Student Program/Plan records that are active and where the corresponding HESA Instance record is set to Report To HESA = Y. Records continue to be included until the Student Program/Plan is completed. The compare logic then determines if the entity should be reported to HESA because some of the data has changed (as compared to the master records) or a child entity should be reported.

Students starting in the reporting period are considered active if:

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- They are term-activated for a term that begins within the reporting period, and have at least one enrollment related to that term.
- They have an FTE value of greater than zero for a period that overlaps the reporting period.

Continuing students are considered active if they have a Program Status defined as eligible for inclusion in Returns Setup.

SID, NUMHUS, and NUMREG are derived during the entity selection.

The field derivation is similar to those currently for Instance while considering the values defined in HESA Instance as well as at Program, Plan, and Sub-Plan level.

To allow some fields to be derived from Plan Offering Year and Sub-Plan Offering Year level (that is, Course Session level), the COURSESESSIONID is determined from the child Student Course Session entity for the Student Registration in the extract. If there are multiple child entities, the Student Course Session with the latest SCSSTARTDATE is used.

Expected End Date (EXPECTEDENDDATE)

Return: Data Futures

Entity: Student Registration

Page Used:

Page	***Page Element***
HESA Instance	EXPECTEDENDDATE
Student Program	Expected Graduation Term

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from the HESA Instance page.
2. Derive the term end date for the Expected Graduation Term in the most recent Student Program record.
3. Derive the EXPECTEDENDDATE of the Course Delivery to which the Student Registration is related.
4. Derive as NULL ERROR.

Fee Eligibility (FEEELIG)

Return: Data Futures

Entity: Student Registration

Page Used:

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Page	*Page Element*
Residency Official 1 (Campus Community, Personal Information (Student), Identification (Student), Residency Data, Residency Official 1)	Residency
Program HESA Data (Program Instance HESA Data)	FEEELIG
Plan HESA Data (Plan Instance HESA Data)	FEEELIG
Plan Offering/Year HESA	FEEELIG
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	FEEELIG
Sub-Plan Offering/Year HESA	FEEELIG
HESA Instance Data	FEEELIG

Field Derivation Rule: Derive a value if Country = England or Northern Ireland

Derivation Steps:

1. Derive from HESA Instance Data.
2. If the entity is based on a sub-plan, derive from Sub-Plan Offering/Year HESA based on the COUDELID from Student Course Session > Course Session > Course Delivery.
3. If entity is based on a sub-plan, derive from Sub-plan Instance HESA Data.
4. Derive from Plan Offering/Year HESA based on the COUDELID from Student Course Session > Course Session > Course Delivery.
5. Derive from Plan Instance HESA Data.
6. Derive from Program Instance HESA Data.
7. Select the student's official Residency value and map to a HESA Fee Eligibility code. Residency records are selected for the EMPLID, Institution, and Academic Career for the most recent Effective Term that starts on or before the end of the reporting period. If the mapping to a HESA code can't be done, an error message is logged.
8. Use default.
9. Derive as NULL ERROR.

Fee Status (FEESTATUS)

Return: Data Futures

Entity: Student Registration

Page Used:

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Page	*Page Element*
Residency Official 1 (Campus Community, Personal Information (Student), Identification (Student), Residency Data, Residency Official 1)	Residency
Program HESA Data (Program Instance HESA Data)	FEESTATUS
Plan HESA Data (Plan Instance HESA Data)	FEESTATUS
Plan Offering/Year HESA	FEESTATUS
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	FEESTATUS
Sub-Plan Offering/Year HESA	FEESTATUS
HESA Instance Data	FEESTATUS

Field Derivation Rule: Derive a value if Country = Scotland

Derivation Steps:

1. Derive from HESA Instance Data.
2. If the entity is based on a sub-plan, derive from Sub-Plan Offering/Year HESA based on the COUDELID from Student Course Session > Course Session > Course Delivery.
3. If entity is based on a sub-plan, derive from Sub-plan Instance HESA Data.
4. Derive from Plan Offering/Year HESA based on the COUDELID from Student Course Session > Course Session > Course Delivery.
5. Derive from Plan Instance HESA Data.
6. Derive from Program Instance HESA Data.
7. Select the student's official Residency value and map to a HESA Fee Eligibility code. Residency records are selected for the EMPLID, Institution, and Academic Career for the most recent Effective Term that starts on or before the end of the reporting period. If the mapping to a HESA code can't be done, an error message is logged.
8. Use default.
9. Derive as NULL ERROR.

Incoming Exchange (INCOMINGEXCHANGE)

Return: Data Futures

Entity: Student Registration

Page Used:

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Page	Page Element
Program HESA Data (Program Instance HESA Data)	INCOMINGEXCHANGE
Plan HESA Data (Plan Instance HESA Data)	INCOMINGEXCHANGE
Plan Offering/Year HESA	INCOMINGEXCHANGE
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	INCOMINGEXCHANGE
Sub-Plan Offering/Year HESA	INCOMINGEXCHANGE
HESA Instance Data	INCOMINGEXCHANGE
HESA Instance Data	Instance Load
Student Program	Academic Load

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from HESA Instance Data.
2. If the entity is based on a sub-plan, derive from Sub-Plan Offering/Year HESA based on the COURSESESSIONID of the child Student Course Session entity.
3. If entity is based on a sub-plan, derive from Sub-plan Instance HESA Data.
4. Derive from Plan Offering/Year HESA based on the COURSESESSIONID of the child Student Course Session entity.
5. Derive from Plan Instance HESA Data.
6. Derive from Program Instance HESA Data.
7. Derive as null.

NHS Employer (NHSEMP)

Return: Data Futures

Entity: Student Registration

Page Used:

Page	Page Element
Program HESA Data (Program Instance HESA Data)	NHSEMP
Plan HESA Data (Plan Instance HESA Data)	NHSEMP
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	NHSEMP

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Page	Page Element
HESA Instance Data	NHSEMP

Field Derivation Rule: Derive a value if all these conditions are met:

- Country = England
- At least one associated Curriculum Accreditation entity associated with the Course Delivery with ACCREDITATIONID = 06919, 11107 or 999021

Derivation Steps:

1. Derive from HESA Instance Data.
2. If entity is based on a sub-plan, derive from Sub-plan Instance HESA Data.
3. Derive from Plan Instance HESA Data.
4. Derive from Program Instance HESA Data.
5. Use default.
6. Derive as null.

Qualified Teacher Status (QTS)

Return: Data Futures

Entity: Student Registration

Page Used:

Page	Page Element
Program HESA Data (Program Instance HESA Data)	QTS
Plan HESA Data (Plan Instance HESA Data)	QTS
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	QTS
HESA Instance Data	QTS

Field Derivation Rule: Derive a value if all these conditions are met:

- Country = England, Northern Ireland
- Related CourseDelivery.TTCID = 03
- StudentRegistration.INCOMINGEXCHANGE is null

Derivation Steps:

1. Use constant.

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2. Derive from HESA Instance Data.
3. If entity is based on a sub-plan, derive from Sub-plan Instance HESA Data.
4. Derive from Plan Instance HESA Data.
5. Derive from Program Instance HESA Data.
6. Use default.
7. Derive as NULL ERROR.

Student Registration Start Date (REGISTRATIONSTARTDATE)

Return: Data Futures

Entity: Student Registration

Page Used:

Page	***Page Element***
HESA Instance	Start Date of Instance

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Value as ‘Start Date of Instance’ in the HESA Instance record, if a value has previously been calculated or manually determined and stored
2. If there is a Research Candidate record for the instance, select the Begin Date (SSR_RS_BEGIN_DT) from the most recent active Consumption record where the effective date is on or before the reporting period end date. Derive as the Begin Date formatted to YYYY-MM-DD. Note: The Status and Consumption Indicator values are not considered.

   The Research Candidate record (SSR_RS_CAND_HDR) is matched to the instance on EMPLID, Institution, Career and Career Number to find the Research Candidate Number (SSR_RS_CANDIT_NBR). If multiple records are found the record with the highest candidate number is selected.

   The consumption records (SSR_RS_CONSMPTN) are associated with the Research Candidate record by EMPLID, Institution and Research Candidate Number.

   The calculated value is stored in HESA Instance Data.

   SSR_RS_CAND_HDR – PK is EMPLID, INSTITUTION, SSR_RS_CANDIT_NBR – potentially there could be more than one header record for an EMPLID, INSTITUTION, CAREER and CAREER NUMBER

   SSR_RS_CONSMPTN – PK is EMPLID, INSTITUTION, SSR_RS_CANDIT_NBR, EFFDT, EFFSEQ
3. Calculated as the earliest Class Start Date for enrolled classes related to the Instance being reported. This selection is similar to that done for StudentOnModule except that it is not restricted to classes

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overlapping the reporting period and considers enrollments for linked careers: • Select activated Terms for the Student Career of the Instance • For each activated term, select classes with: o Status = Enrolled o Units Taken is greater than zero o Grading Basis matches one of the values defined for Grading Basis Inclusion with the Extract check box selected in HESA Configuration o Repeat Code is not one of the value defined for Repeat Code Exclusion with the Extract check box selected in HESA Configuration • If the student has multiple careers with the same Academic Career value as the career being processed (i.e. same Career but different Career Number) then a further filter is applied to the enrollments. In that case a class is only considered if the program value of the enrollment record (PS_STDNT_ENRL) is null or matches one of the program values in the Student Program records for that career/career number. • If the Instance has been linked to a prior Student Career using the 'Linked Career' and 'Linked Career Number' fields in the HESA Instance record, then classes for the previous career are also considered • The earliest Class Start Date from all the selected classes is derived The calculated value is stored in HESA Instance Data.

4. The earliest Effective Date of the HESA Instance Data records.

Data Futures Return: Student Course Session Entity

Bundle 52. New

For each Student Registration entity in the extract, a Student Course Session is created if the student is deemed to be "active" for the reporting period.

For new students (those starting in the reporting period), Student Registration entities are created only if the student is deemed to be active, that is, their term is activated with enrollment or with FTE.

For continuing students, a Student Course Session entity is created if any of the following conditions is met:

- The student has been term-activated for a term that overlaps the reporting period and has at least one enrolled class related to that term.
- For activated terms for the related Student Career, at least one class exists in Student Enrollment (STDNT_ENRL) where Grade In/Official has a value and Grade Date is in the reporting period.
- The student has an FTE value of greater than zero for the reporting period of the return, or for a reporting period that has dates that overlap the reporting period of the return.

The related COURSESESSIONID is determined based on the value defined for Current Course Session in HESA Instance. If Current Course Session is not defined, the COURSESESSIONID is determined with reference to values from Student Program and HESA Instance.

Intended Thesis Title (INTENDEDTHESISTITLE)

Return: Data Futures

Entity: Student Course Session

Page Used:

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Page	Page Element
Graduate Research Management > Thesis Management > Thesis Submission Graduate Research Management > Candidate Management > Research Topic	Thesis Title
HESA Instance – Thesis Details	Intended Thesis Title

Field Derivation Rule: If all the following conditions are met, derive a value:

- At least one child FundingBody entity has FUNDINGBODY = 0002, 0003, 0009, 0012, 0018, 0019 or 0022,
- Engagement.STUDYINTENTION = D0003 *OR* Engagement.STUDYINTENTION is null *and* the related Qualification.QUALCAT = D0003
- StudentRegistration.INCOMINGEXCHANGE is null

Derivation Steps:

1. Derive from HESA Instance.
2. If there is a Research Candidate record for the related instance, derive Thesis Title from the latest Thesis Management record.
3. If there is a Research Candidate record for the related instance, derive Thesis Title from the latest Research Topic record for the record with the highest sequence (SSR_RS_TOPIC_SEQ).
4. Derive as null.

Intercalation (INTERCALATE)

Return: Data Futures

Entity: Student Course Session

Page Used:

Page	Page Element
Program HESA Data (Program Instance HESA Data)	INTERCALATE
Plan HESA Data (Plan Instance HESA Data)	INTERCALATE
Plan Offering/Year HESA	INTERCALATE
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	INTERCALATE
Sub-Plan Offering/Year HESA	INTERCALATE
HESA Instance Data	INTERCALATE

Field Derivation Rule: Include for all entities

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Derivation Steps:

1. Derive from HESA Instance.
2. If the Course Session is based on a sub-plan, derive from Sub-Plan Offering/Year HESA based on the COURSESESSIONID.
3. If the Course Session is based on a sub-plan, derive from Sub-Plan HESA Data.
4. Derive from Plan Offering/Year HESA based on the COURSESESSIONID.
5. Derive from Plan Instance HESA Data.
6. Derive from Program Instance HESA Data.
7. Use default.
8. Derive as null.

PhD Submission Date (PHDSUB)

Return: Data Futures

Entity: Student Course Session

Page Used:

Page	***Page Element***
Records and Enrollment > Career and Program Information > Student Program/Plan	Program Action and Reason
Graduate Research Management > Thesis Management > Thesis Submission	Actual Submission Date
HESA Instance	PHDSUB

Field Derivation Rule: If all the following conditions are met, derive a value:

- Engagement.STUDYINTENTION = D0003 *or* Engagement.STUDYINTENTION is null and the related Qualification.QUALCAT = D0003
- StudentRegistration.INCOMINGEXCHANGE is null

Derivation Steps:

1. Derive from HESA Instance.
2. If there is a Research Candidate record for the instance, select the earliest Thesis record where Actual Submission Date has a value and the effective date is on or before the reporting period end date. Derive as the Actual Submission Date formatted to YYYY-MM-DD.
3. Select the earliest effective-dated record in the Student Program/Plan stack that has a Program Action and Reason defined in HESA Return Setup – PhD Submission Action Reason Mapping and an

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effective date on or before the reporting period end date. Derive as the Effective Date of the record formatted to YYYY-MM-DD.

4. If at least one child FundingBody entity has FUNDINGBODY = 0002, 0003, 0009, 0012, 0018, 0019, or 0022, derive as NULL ERROR

5. Derive as null.

Reason for Student Course Session Ending (RSNSCSEND)

Return: Data Futures

Entity: Student Course Session

Page Used:

Page	***Page Element***
Records and Enrollment > Career and Program Information > Student Program/Plan	Program Action/Action Reason
HESA Instance	RSNSCSEND

Field Derivation Rule: Derive a value if SCSENDDATE has a value and is on or before the current date, or SCSENDDATE is null and the related CourseSession.SESSIONENDDATE is on or before the current date.

The CourseSession.SESSIONENDDATE is determined from the extract data using COURSESESSIONID to link to Course Session. If COURSESESSIONID does not exist in the extract data, the SESSIONENDDATE is derived from the most recent Course Session Master record.

Derivation Steps:

1. Derive from HESA Instance.

2. If the latest non-future row in Student Program/Plan has a program action/reason combination that is mapped to a RSNSCSEND value, derive the mapped value.

3. Derive as default.

4. Derive as NULL ERROR.

Student Course Session End Date (SCSENDDATE)

Return: Data Futures

Entity: Student Course Session

Page Used:

Page	***Page Element***
HESA Instance	SCSENDDATE

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Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from HESA Instance.
2. If the latest non-future row in Student Program/Plan has a program action/reason combination that is mapped to a RSNSCSEND value, derive the effective date of the record in YYYY-MM-DD format.
3. Derive as null.

Student Course Session Start Date (SCSSTARTDATE)

Return: Data Futures

Entity: Student Course Session

Page Used:

Page	***Page Element***
HESA Instance	Session Start Date

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If the date is later than the related CourseSession.SESSIONSTARTDATE, derive from HESA Instance.
2. Derive as null.

Student Load (STULOAD)

Return: Data Futures

Entity: Student Course Session

Page Used:

Page	***Page Element***
HESA Instance	Calculated FTE Override FTE Report Zero

Field Derivation Rule: If SCSENDDATE has a value and is on or before the current date, or SCSENDDATE is null and the related CourseSession.SESSIONENDDATE is on or before the current date, then derive a value.

Derivation Steps:

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1. Derive as zero if the Report Zero check box is selected on the HESA Instance FTE record.
2. Override FTE recorded in HESA Instance if the value is greater than zero
3. Calculate FTE in HESA Instance.
4. Use default.
5. Derive as NULL ERROR.

Data Futures Return: Funding Body Entity

Bundle 52. New

For each Student Course Session entity in the extract, a single entity is created if a non-null FUNDINGBODY value can be derived.

Funding Body (FUNDINGBODY)

Return: Data Futures

Entity: Funding Body

Page Used:

Page	***Page Element***
Program HESA Data (Program Instance HESA Data)	FUNDINGBODY
Plan HESA Data (Plan Instance HESA Data)	FUNDINGBODY
Sub-Plan HESA Data (Sub-plan Instance HESA Data)	FUNDINGBODY
HESA Instance Data	FUNDINGBODY

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Use constant.
2. Derive from HESA Instance.
3. If the related StudentRegistration entity is based on a sub-plan, derive from Sub-Plan HESA Data
4. Derive from Plan HESA Data based on the related StudentRegistration entity.
5. Derive from Program HESA Data based on the related StudentRegistration entity.
6. Use default.
7. Derive as null.

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Data Futures Return: Student Entity

Bundle 52. New

For each distinct SID in the Student Registration extract records, a single Student entity is created.

Birthdate (BIRTHDTE)

Return: Data Futures

Entity: Student

Page Used:

Page	***Page Element***
Personal Information (Student) > Add/Update a Person > Biographical Information > Person Information	Date of Birth

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive Date of Birth in the format YYYY-MM-DD.
2. Derive as NULL ERROR.

First Names (FNAMES)

Return: Data Futures

Entity: Student

Page Used:

Page	***Page Element***
Personal Information (Student) > Add/Update a Person > Biographical Information > Names	First Name Middle Name

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive the First Name and Middle Name values of the most recent effective dated Primary name record that falls within the reporting period.
2. Derive as null.

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Previous Surname (PREVSURNAME)

Return: Data Futures

Entity: Student

Page Used:

Page	*Page Element*
Personal Information (Student) > Add/Update a Person > Biographical Information > Names	Last Name

Field Derivation Rule: If all these conditions are met, derive a value:

- Country = England
- The student has a Student Registration entity in the extract that is associated with a CourseDelivery with TTCID = 01.

Derivation Steps:

1. Derive the Last Name value of the most recent effective dated Primary name record where the effective date is before the date of the record used to derive SURNAME and the Last Name is different from the derived value for SURNAME.
2. Derive as null.

Sex Identifier (SEXID)

Return: Data Futures

Entity: Student

Page Used:

Page	*Page Element*
Personal Information (Student) > Add/Update a Person > Biographical Information > Biographical History	Gender
HESA Student Data/HESA Restricted Data	SEXID

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from Person HESA Data.
2. Map the Gender value from the most recent effective dated active Biographical History record that falls within the reporting period to a HESA code via the Gender mapping.
3. If a mapping doesn’t exist, then the Gender value defaults as follows:
    - F (Female) to 10

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- M (Male) to 11

4. Use default.
5. Derive as NULL ERROR.

Surname at 16 (SNAME16)

Return: Data Futures

Entity: Student

Page Used:

Page	*Page Element*
Personal Information (Student) > Add/Update a Person > Biographical Information > Names	Last Name

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive the Last Name value of the most recent effective dated name record that falls on or before the reporting period end date where the name type is defined for the field in Returns Setup.
2. Derive as null.

Surname (SURNAME)

Return: Data Futures

Entity: Student

Page Used:

Page	*Page Element*
Personal Information (Student) > Add/Update a Person > Biographical Information > Names	Last Name

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive the Last Name value of the most recent effective dated Primary name record that falls on or before the reporting period end date.
2. Derive as NULL ERROR.

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Title (TITLEID)

Return: Data Futures

Entity: Student

Page Used:

Page	*Page Element*
Personal Information (Student) > Add/Update a Person > Biographical Information > Names	Prefix

Field Derivation Rule: If all these conditions are met, derive a value:

- Country = England
- The student has a Student Registration entity in the extract that is associated with a CourseDelivery with TTCID = 01.

Derivation Steps:

1. Map the Prefix value of the most recent effective dated Primary name record on or before the reporting period end date to a TITLEID code using the Prefix Mapping.
2. If the Prefix is blank or is not mapped, derive as null.

Graduate Outcomes Return: Provider Entity

If Retain Data from Previous Run is:

- selected, initially any existing inactive extract records are deleted and any existing active records are set to inactive for all the extract records before new entities are created.
- not selected, then initially all the existing extract records for the return are deleted before new entities are created. This applies to all the extract records.

Entity selection and field derivation is as per INSTITUTION in DLHE return.

A single active Provider entity is created in the Institution Extract Data record (SSR_HE_INST_EXT) for a Graduate Outcomes return based on the HESA Returns Setup record.

The SSR_HE_INSTAPP value is saved as blank as this field is not required for GRADOUT returns.

Census (CENSUS)

Return: GRADOUT

Entity: Provider

Pages Used: None

Field Derivation Rule: Include for all entities.

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Derivation Steps:

Derive as the short translate name for the selected survey parameter:

- A = Dec
- B = Mar
- C = Jun
- D = Sep

Record Type Indicator (RECID)

Return: GRADOUT

Entity: Provider

Pages Used:

Page	***Page Element***
Reporting Periods (Records and Enrollment, HESA Reporting, HESA Returns Setup, Reporting Periods)	Record Year
Returns (Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns)	Record ID

Field Derivation Rule: Include for all Institution entities

Derivation Step: Derive as YYNNN, where YY is the final two digits of the Record Year (for example, 17 for 2017) and NNN is the three-digit Record ID for the seeded return (071 for GRADOUT).

UK Provider Reference Number (UKPRN)

Return: GRADOUT

Entity: Provider

Pages Used:

Page	***Page Element***
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Step: Derive from the HESA Configuration page.

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Graduate Outcomes Return: Graduate Entity

A Graduate entity is created in the survey extract record (SSR_HE_DL_EXT) for each distinct survey record for the return that meets the following criteria:

- If at least one survey status has been defined in HESA Returns Setup (SSR_HE_DL_STAT), then a survey is only included if it has a status value that matches one of the defined statuses. If a survey status is not defined, then the survey is included irrespective of status.
- A survey is only included based on Survey (SSR_HE_APRJAN) when the corresponding Survey (that is, CENSUS) parameter (A, B, C, or D) is selected.
- If the Student Override check box is selected, survey selection is restricted based on the defined EMPLID values.
- If *Null Error Only* is selected for Student entities:
  - Select only survey records where at least one field has a derived value of NULL ERROR
  - A flag in the survey extract table (SSR_HE_DL_EXT) is set to “Y” if there is at least one field with a derived value of NULL ERROR (SSR_HE_STD_NULLERR) in either the Survey or Postal Address extract fields records

The record SSR_HE_DL_EXT and SSR_HE_DL_EX_FL are used to hold the Graduate entity values.

The derived values for APRJAN and HUSID are stored in the main table. The fields table holds the derived values for the other fields.

The Null Error flag (SSE_HE_STD_NULLERR) is set to ‘Y’ if any of the fields in any of the related entities is derived as NULL ERROR.

Country (COUNTRY)

Return: GRADOUT

Entity: Graduate

Pages Used: None

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. Select the most recent active, effective-dated address record with an Address Type that corresponds to Address Types for COUNTRY in the HESA Return Setup record (or if no Address Types are defined then consider all address types) where the country code is one of the UK codes (GBR, ENG, SCT, WAL, NIR, XF, XG, XH or XI).

   If multiple UK addresses are found with the same effective date, then one is randomly selected.

   Derive the HESA country code as follows:

   - GBR = XK

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- ENG or XF = XF
- NIR or XG = XG
- SCT or XH = XH
- WAL or XI = XI

2. Select the most recent active, effective-dated address record with an Address Type that corresponds to Address Types for COUNTRY in the HESA Return Setup record (or if no Address Types are defined then consider all address types) where the country code is *not* one of the UK codes.

   If multiple non-UK addresses are found with the same effective date, then one is randomly selected.

   Derive the two-character country code from the Country table, for example: AUS (Australia) = AU.

3. Use default. (for example, ZZ = not known)
4. Derive as NULL ERROR.

Email Address (EMAIL, EMAIL2, EMAIL3)

Return: GRADOUT

Entity: Graduate

Pages Used:

Page	***Page Element***
Electronic Addresses (Campus Community >Personal Information (Student) >Add/Update a Person >Biographical Information	Email Address, Type

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. Select up to three email addresses where the email type matches one of the types set up in Returns Setup – HESA types for EMAIL, or no types are set up for the return for EMAIL.

   If one of the selected emails has preferred = “Y,” that record is used for EMAIL and any other selected email addresses are used for EMAIL2 and EMAIL3. If more than three email addresses are selected, then the values are derived by by email type in ascending order.

2. Derive as NULL.

Forenames (FNAMES)

Return: GRADOUT

Entity: Graduate

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Pages Used:

Page	Page Element
Survey Details — Supplied Fields	Forenames

Field Derivation Rule: Include for all entities.

Derivation Steps:

1. Derive from the survey record.
2. Derive as NULL.

Forename Change (FNMECHNGE)

Return: Student Record

Entity: Student

Page Used:

Page	Page Element
Names (Campus Community > Personal Information (Student) > Add/Update a Person > Biographical Details > Names)	First Name Middle Name

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If First Name space Middle Name of the most recent effective-dated primary name record is different from the derived FNAMES value, derive the value.
2. Derive as null.

Status of Graduate (GRADSTATUS)

Return: GRADOUT

Entity: Graduate

Pages Used:

Page	Page Element
Survey Details — Supplied Fields	Graduate Status
Campus Community >Personal Information >Biographical >Personal Attributes >Decedent Data	Date of Death

Field Derivation Rule: Include for all entities.

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Derivation Steps:

1. Derive from the survey record.
2. If Date of Death is populated, derive as 01 (deceased).
3. If null values are derived for all email and telephone fields, derive as 02 (not contactable by email or telephone).
4. Derive as NULL.

HESA Unique Graduate Identifier (HUSID)

Return: GRADOUT

Entity: Graduate

Pages Used:

Page	***Page Element***
Survey Details — Supplied Fields	HUSID

Field Derivation Rule: Include for all entities.

Derivation Step: Derive from the survey record.

International Telephone (INTTEL, INTTEL2, INTTEL3)

Return: GRADOUT

Entity: Graduate

Pages Used:

Page	***Page Element***
Campus Community >Personal Information >Addresses/ Phones >Phone Numbers	Phone Number Country Code

Field Derivation Rule: Derive up to three values from non-UK phone numbers where the phone type matches one of the types set up in Returns Setup – HESA Types for INTTEL, or no types are set up for the return for that field and either one of the following:

- Country Code has a value and is *not* 000 nor 044
- Country Code is blank or 000, phone number starts with +, and Phone number does not start +44

If one of the selected records has Preferred = “Y,” that record is used for INTTEL and any other records are used for INTTEL2 and INTTEL3. If more than three non-UK phone numbers are selected, then fields are derived by phone type in ascending order.

Derivation Step:

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1. Remove special characters, spaces, and leading zeros from the phone number as well as any country code with leading zeros.

   Derive the value if it is 17 digits or fewer.

2. For INTTEL, if the preferred phone number is derived and the derived number is longer than 17 digits, derive as NULL ERROR.

Own Graduate Identifier (OWNSTU)

Return: GRADOUT

Entity: Graduate

Pages Used:

Page	*Page Element*
Survey Details — Header	EMPLID

Field Derivation Rule: Include for all entities.

Derivation Step: Derive from the survey record.

Surname Change (SNAMECHNGE)

Return: Student Record

Entity: Student

Page Used:

Page	*Page Element*
Names (Campus Community > Personal Information (Student) > Add/Update a Person > Biographical Details > Names)	Last Name

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If the Last Name of the most recent effective-dated primary name record is different from the derived SURNAME value, derive the value.

2. Derive as null.

Surname (SURNAME)

Return: GRADOUT

Entity: Graduate

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Pages Used:

Page	Page Element
Survey Details — Supplied Fields	Surname

Field Derivation Rule: Include for all entities.

1. Derive from the survey record.
2. Derive as NULL ERROR.

UK Mobile (UKMOB, UKMOB2, UKMOB3)

Return: GRADOUT

Entity: Graduate

Pages Used:

Page	Page Element
Campus Community >Personal Information >Addresses/ Phones >Phone Numbers	Phone Number

Field Derivation Rule: Derive up to three values from UK phone numbers where:

- Phone type matches one of the types set up in Returns Setup – HESA Types for UKMOB, or types are not set up for the return for that field
- Country code is blank, 000, or 044
- Phone number does not start with + or starts with +44
- Phone number where the special characters, spaces, leading 44, and leading zeros are removed starts in the range 71 to 79

If one of the selected records has Preferred = “Y,” that record is used for UKMOB and any other records are used for UKMOB2 and UKMOB3. If more than three UK phone numbers are selected, then fields are derived by phone type in ascending order.

Derivation Step:

1. Remove special characters, spaces, and leading 44 from the phone number. A leading zero is added if one does not exist.

   Derive the value if it is 11 digits.

2. If the preferred phone number is derived and the derived number is not 11 digits, derive as NULL ERROR.

Note: This selection excludes personal numbers that begin with 070.

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UK Telephone (UKTEL, UKTEL2, UKTEL3)

Return: GRADOUT

Entity: Graduate

Pages Used: None

Field Derivation Rule: Derive up to three values from UK phone numbers where:

- Phone type matches one of the types set up in Returns Setup – HESA Types for UKTEL, or types are not set up for the return for that field
- Country code is blank, 000, or 044
- Phone number does not start with + or +44
- Phone number where the special characters, spaces, leading 44, and leading zeros are removed does not start in the range 71 to 79

If one of the selected records has Preferred = “Y,” that record is used for UKTEL and any other records are used for UKTEL2 and UKTEL3. If more than three UK phone numbers are selected, then UKTEL2 and UKTEL3 are derived by phone type in ascending order.

Derivation Step:

1. Remove special characters, spaces, and leading 44 from the phone number. A leading zero is added if one does not exist.

   Derive the value if it is 10 or 11 digits.

2. If the preferred phone number is derived and the derived number is not 10 or 11 digits, derive as NULL ERROR.

Note: This selection includes personal numbers that begin with 070.

Graduate Outcomes Return: Postal Address Entity

For each Graduate entity where the derived GRADSTATUS = 2 (cannot be contacted by email or telephone), one or two Postal Address entities are created where COUNTRY has been derived from a UK address in derivation step 1 and is one of the UK codes XF, XH, XI, XG, or XK. At least one entity is required where COUNTRY is XF, XH, XI, XG, or XK (that is,. UK), and, in a similar way to the COUNTRY field, UK addresses are derived ahead of non-UK addresses.

Entities are created based on address records with an Address Type that corresponds to those defined as the Address Types for COUNTRY in the HESA Return Setup record. If Address Types are not defined, then all address types are considered. Initially, addresses with UK country codes (GBR, ENG, SCT, WAL, NIR, XF, XG, XH or XI) are selected (with the most recent ones first) to create two entities. If multiple UK addresses are found with the same effective date, then the addresses are randomly selected. Because this selection matches the first derivation step of COUNTRY, at least one Postal Address entity should always be created when COUNTRY is XF, XH, XI, XG, or XK.

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Address Line 1 (ADDRESSLN1)

Return: GRADOUT

Entity: Postal Address

Pages Used:

Page	*Page Element*
Campus Community >Personal Information >Biographical >Addresses/Phones >Addresses	Address 1

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from Address 1, truncated to 50 characters.
2. Derive as NULL.

Address Line 2 (ADDRESSLN2)

Return: GRADOUT

Entity: Postal Address

Pages Used:

Page	*Page Element*
Campus Community >Personal Information >Biographical >Addresses/Phones >Addresses	Address 2

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from Address 2, truncated to 50 characters.
2. Derive as NULL.

Address Line 3 (ADDRESSLN3)

Return: GRADOUT

Entity: Postal Address

Pages Used:

Page	*Page Element*
Campus Community >Personal Information >Biographical >Addresses/Phones >Addresses	Address 3

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Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from Address 3, truncated to 50 characters.
2. Derive as NULL.

Address Line 4 (ADDRESSLN4)

Return: GRADOUT

Entity: Postal Address

Pages Used:

Page	*Page Element*
Campus Community >Personal Information >Biographical >Addresses/Phones >Addresses	Address 4

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from Address 4, truncated to 50 characters.
2. Derive as NULL.

Note: This is not derived for UK addresses unless the delivered UK address format is updated to add Address 4.

Address Line 5 (ADDRESSLN5)

Return: GRADOUT

Entity: Postal Address

Pages Used:

Page	*Page Element*
Campus Community >Personal Information >Biographical >Addresses/Phones >Addresses	City

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive from City.
2. Derive as NULL.

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Address Line 6 (ADDRESSLN6)

Return: GRADOUT

Entity: Postal Address

Pages Used:

Page	*Page Element*
Campus Community >Personal Information >Biographical >Addresses/Phones >Addresses	County

Field Derivation Rule: Include for all entities

Derivation Steps:

1. Derive as description for the County code.
2. Derive as NULL.

Postcode (POSTCODE)

Return: GRADOUT

Entity: Postal Address

Pages Used:

Page	*Page Element*
Campus Community >Personal Information >Biographical >Addresses/Phones >Addresses	Post Code

Field Derivation Rule: Include for all entities

Derivation Steps:

1. If the value is 8 characters or fewer, derive from the selected address record.
2. Derive as NULL ERROR.

DLHE Return: Institution Entity

The Create Extract Application Engine (SSR_HE_DATA) process creates a single Institution entity. The Institution entity is composed of two fields.

Record Type Indicator (RECID)

Return: DLHE

Entity: Institution

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Pages Used:

Page	Page Element
Reporting Periods (Records and Enrollment, HESA Reporting, HESA Returns Setup, Reporting Periods)	Record Year
Returns (Records and Enrollment, HESA Reporting, HESA Returns Setup, Returns)	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where YY is the final 2-digits of the Record Year (for example, 11 for 2011) and NNN is the 3-digit Record ID for the seeded return.

UK Provider Reference Number (UKPRN)

Return: DLHE

Entity: Institution

Pages Used:

Page	Page Element
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Configuration page.

DLHE Return: Student Entity

The Create Extract process creates a Student entity for each distinct DLHE survey record.

If at least one survey status has been defined on the HESA Returns page, then the process includes a survey only if the survey has a status value that matches one of the defined statuses. If you have not defined a survey status on the HESA Returns page, then the process includes the survey irrespective of status value. Use the Survey Management component to verify the status of a survey (Records and Enrollment, HESA Reporting, Destination of Leavers, Survey Management).

If you have selected the Null Errors Only check box for the Include Student Entities on the Create Extract Data page, the process selects distinct EMPLIDs from the existing active DLHE extract data, where at least one field in the Student, Employment, Study, or Teaching extract data has a derived value of *NULL ERROR.* The process then selects the survey records for these EMPLIDs. If a student has more than one survey record, then the process selects all the student's surveys if any of them has any *NULL ERROR* values.

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If you have selected the Student Override check box, the process considers the survey records for only the EMPLIDs you have selected.

All Activities – Q1 (ALLACT1)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section A) self-service	Q1 – Activities check box 1

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If Student.STATUS = 07 or 08, derive as *X* (ineligible or explicit refusal).
2. If the check box is selected, derive as *1*.
3. If none of the check boxes has been selected (that is, Student.ALLACT2 to Student.ALLACT8 are all derived as NULL), derive as *NULL ERROR.*
4. Do not derive a value and leave the field blank.

All Activities – Q1 (ALLACT2-8)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section A) self-service	Q1 – Activities check boxes 2 to 8

Field Derivation Rule: Student.STATUS is not 07 or 08.

Derivation Steps:

1. Derive as follows:
   - ALLACT2 - Derive as *2* if the check box is selected.
   - ALLACT3 - If reporting period is 2013/14 or later, derive as *9* if the check box is selected. Otherwise, derive as *3* if the check box is selected.
   - ALLACT4 - Derive as *4* if the check box is selected.
   - ALLACT5 - Derive as *5* if the check box is selected.

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- ALLACT6 - Derive as *6* if the check box is selected.
- ALLACT7 - Derive as *7* if the check box is selected.
- ALLACT8 - Derive as *8* if the check box is selected.

2. Do not derive a value and leave the field blank.

April or January Survey (APRJAN)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Survey Details	Survey

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record, either *1* or *2*.

Higher Education experience for business – Q33 (HEBUSNEXP)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section E) self-service	Q33

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If Student.STATUS = 03, 05, 06, 07 or 08, derive as *6* (unable to code).
2. Derive from the survey record.
3. If Student.STATUS = 02, derive as *6*.
4. Use default (from HESA Fields page in the HESA returns setup).
5. Derive as *NULL ERROR*.

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Higher Education experience for study – Q32 (HESTUDYEXP)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section E) self-service	Q32

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If Student.STATUS = 03, 05, 06, 07 or 08, derive as *6* (unable to code).
2. Derive from the survey record.
3. If Student.STATUS = 02, derive as *6*.
4. Use default.
5. Derive as *NULL ERROR*.

Higher Education experience for work – Q31 (HEWORKEXP)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section E) self-service	Q31

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If Student.STATUS = 03, 05, 06, 07 or 08, derive as *6* (unable to code).
2. Derive from the survey record.
3. If Student.STATUS = 02, derive as *6*.
4. Use default.
5. Derive as *NULL ERROR*.

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HESA unique student identifier (HUSID)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Survey Details	HUSID

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.

Most important activity – Q1 (MIMPACT)

Return: DLHE

Entity: Student

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section A) self-service	Q1 – Most important option

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If Student.STATUS = 07 or 08, derive as *X* (ineligibility or explicit refusal).
2. If a Most important option has been selected, derive the value from *1* to *8* (depending on which Most important option is selected).

   If the reporting period is 2013/14 or later, convert *3* to *9*.
3. Derive as *NULL ERROR.*

Status of data collection (STATUS)

Return: DLHE

Entity: Student

Page Used:

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Page	Page Element
Survey Details	Survey Method

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. Derive from the survey record.
2. Use default value (this is derived from the HESA Fields page not from the Survey Status value on the HESA Returns page).
3. Derive as *NULL ERROR.*

Opt Out from Communications (OPTOUT)

Return: DLHE

Entity: Student

Page Used:

Page	Page Element
Survey Details	Opt out check box

Field Derivation Rule: Include for all survey records in a DLHE return.

Derivation Steps:

1. If check box is selected, derive as 1.
2. Derive as null.

DLHE Return: Employment Entity

For each Student entity, if Student.ALLACT1 = *1* or Student.ALLACT2 = *2*, then an Employment entity is included in the Student entity and the Employment entity fields are derived. Otherwise, an Employment entity is not included.

Note: Student.ALLACT is derived as *X* and Student.ALLACT2 is derived as blank if Student.STATUS is *07* (deceased) or *08* (reply explicitly refused) so in that case an Employment entity is not created.

Employment basis (EMPBASIS)

Return: DLHE

Entity: Employment

Page Used:

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Page	Page Element
Enter DLHE Survey (Section B) self-service	Q5

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from the survey record (01 to 11).
2. If Student.STATUS = 03, 05 or 06, derive as *99* (unknown).
3. Derive as *NULL ERROR*.

Country of employment (EMPCOUNTRY)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q13 – Employment Country *

* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from the survey record.
2. If Employment.EMPPCODE value does not exist, derive as *NULL ERROR*.
3. Do not derive a value and leave the field blank.

Currency of Pay (EMPCURRENCY)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q8

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

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Derivation Steps:

1. If Employment.EMPPAY > 0, derive from survey record.
2. Derive as null.

Hours Worked per Week (EMPHOURS)

Return: DLHE

Entity: Employment

Page Used:

Page	*Page Element*
Enter DLHE Survey (Section B) self-service	Q9

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. If ALLACT1 = 1 or ALLACT2 = 2 and the value is greater than zero, derive from survey record.
2. Derive as null.

Importance to employer (EMPIMP)

Return: DLHE

Entity: Employment

Page Used:

Page	*Page Element*
Enter DLHE Survey (Section B) self-service	Q16

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. If Employment.QUALREQ = 11 or 12, derive from the survey record *(1, 2, 4, 5* or *8)*.
2. Do not derive a value and leave the field blank.

Employer name (EMPNAME)

Return: DLHE

Entity: Employment

Page Used:

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Page	Page Element
Enter DLHE Survey (Section B) self-service	Q11

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from the survey record.
2. Derive as *NULL ERROR.*

PAY (EMPPAY)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q6

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. If the value is greater than zero, derive from survey record.
2. Derive as null.

Note: The system derives the Employment.EMPPAY field prior to Employment.EMPUNPAID.

Payment Period (EMPPAYPERIOD)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q7

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. If Employment.EMPPAY value is greater than zero, derive from the survey record.

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2. Derive as null.

UK Postcode for place of employment (EMPPCODE)

Return: DLHE

Entity: Employment

Page Used:

Page	*Page Element*
Enter DLHE Survey (Section B) self-service	Q13 – Postcode (UK only)

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from the survey record.
2. Do not derive a value and leave the field blank.

Note: The system derives the Employment.EMPPCODE field prior to the derivation of Employment.EMPCOUNTRY.

Place of employment (EMPPLACE)

Return: DLHE

Entity: Employment

Page Used:

Page	*Page Element*
Enter DLHE Survey (Section B) self-service	Q13 – Town/city/area

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from the survey record.
2. Do not derive a value and leave the field blank.

Unpaid work (EMPUNPAID)

Return: DLHE

Entity: Employment

Page Used:

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Page	Page Element
Enter DLHE Survey (Section B) self-service	Q6 – Unpaid Work

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. If Employment.EMPPAY value does not exist, derive from survey record *(1* if Unpaid Work check box is selected)
2. Derive as null.

Total estimated earnings for a year (ESTEARN)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q10

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record if the value is greater than zero.
2. Do not derive a value and leave the field blank.

Job duties (JOBDUTIES)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q4

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record.
2. Do not derive a value and leave the field blank.

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How found job (JOBFOUND)

Return: DLHE

Entity: Employment

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section B) self-service	Q18

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record (01 to 09).

   If the reporting period is 2013/14 or later:

   - 01 is converted to 10
   - 06 is converted to 12

2. Do not derive a value and leave the field blank.

All reasons for taking the job (JOBRSNALL1)

Return: DLHE

Entity: Employment

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section B) self-service	Q17 – Reasons check box 1

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive as *01* if the check box has been selected.
2. Do not derive a value and leave the field blank.

All reasons for taking the job (JOBRSNALL2 to 9)

Return: DLHE

Entity: Employment

Page Used:

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Page	Page Element
Enter DLHE Survey (Section B) self-service	Q17 – Reasons check boxes 2 to 9

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive as follows:
   - JOBRSNALL2 - Derive as *02* if the check box is selected.
   - JOBRSNALL3 - Derive as *03* if the check box is selected.
   - JOBRSNALL4 - Derive as *04* if the check box is selected.
   - JOBRSNALL5 - Derive as *05* if the check box is selected.
   - JOBRSNALL6 - Derive as *06* if the check box is selected.
   - JOBRSNALL7 - Derive as *07* if the check box is selected.
   - JOBRSNALL8 - Derive as *08* if the check box is selected.
   - JOBRSNALL9 - Derive as *09* if the check box is selected.
2. Do not derive a value and leave the field blank.

Main reason for taking the job (JOBRSNMAIN)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q17 – Main reason

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record (01 to 09).
2. Do not derive a value and leave the field blank.

Note: There is validation on the self-service page to ensure that the option selected for Main reason has also been selected as one of the Reasons.

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Number of jobs (JOBSNO)

Return: DLHE

Entity: Employment

Page Used:

Page	*Page Element*
Enter DLHE Survey (Section B) self-service	Q2

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record if greater than 1 (2 to 9).
2. Do not derive a value and leave the field blank.

Note: There is validation on the self-service page to ensure the value entered is greater than 1. In step 1, the value is checked to ensure that zero is not derived.

Job title (JOBTITLE)

Return: DLHE

Entity: Employment

Page Used:

Page	*Page Element*
Enter DLHE Survey (Section B) self-service	Q3

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record.
2. If Employment.JOBDUTIES value does not exist, derive as *NULL ERROR*.
3. Do not derive a value and leave the field blank.

Nature of employer's business (MAKEDO)

Return: DLHE

Entity: Employment

Page Used:

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Page	Page Element
Enter DLHE Survey (Section B) self-service	Q12

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record.
2. Derive as *NULL ERROR.*

NHS Organisation – Q14 (NHSORG)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Q14

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record. (1, 2, or 8)
2. Derive as *X*.

Postdoctoral research contract – derived from Q3 and Q4 (POSTDOC)

Return: DLHE

Entity: Employment

Page Used:

Page	Page Element
Enter DLHE Survey (Section B) self-service	Postdoctoral Research Contract *

* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record (1, 2 or 3).

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2. Do not derive a value and leave the field blank.

Previously employed (PREVEMP)

Return: DLHE

Entity: Employment

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section B) self-service	Q19

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record (1, 2, 3, or 4).
2. Do not derive a value and leave the field blank.

Category of previous employment (PREVWORK1)

Return: DLHE

Entity: Employment

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section B) self-service	Q20 – check box 1

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. If PREVEMP = 1, 2 or 3, then derive as *01* if the check box has been selected.
2. Do not derive a value and leave the field blank.

Category of previous employment (PREVWORK2 to 7)

Return: DLHE

Entity: Employment

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section B) self-service	Q20 – check boxes 2 to 7

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Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive as follows:
   - PREVWORK2 - Derive as *02* if the check box is selected.
   - PREVWORK3 - Derive as *03* if the check box is selected.
   - PREVWORK4 - Derive as *04* if the check box is selected.
   - PREVWORK5 - Derive as *05* if the check box is selected.
   - PREVWORK6 - Derive as *06* if the check box is selected.
   - PREVWORK7 - Derive as *07* if the check box is selected.
2. Do not derive a value and leave the field blank.

Qualification required for job (QUALREQ)

Return: DLHE

Entity: Employment

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section B) self-service	Q15

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record (11, 12, 13 or 14).
2. Do not derive a value and leave the field blank.

Standard Occupational Classification 2010 - derived from Q3 and Q4 (SOCDLHE2010)

Return: DLHE

Entity: Employment

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section B) self-service	Occupational Classification *

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* Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return with an Employment entity.

Derivation Steps:

1. Derive from survey record.
2. Derive as *NULL ERROR*.

DLHE Return: Teaching Entity

For each Student entity, if Student.STATUS is not *07* or *08*, then a Teaching entity is included in the Student entity and the Teaching entity fields are derived. Otherwise (that is, Student.STATUS is *07* or *08*), a Teaching entity is not included in the Student entity.

Employed as teacher (EMPLDTEACH)

Return: DLHE

Entity: Teaching

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section C) self-service	Q21
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return with a Teaching entity.

Derivation Steps:

1. Derive from survey record (1 or 2).
2. If the check box is selected, derive as *NULL ERROR*.
3. Do not derive a value and leave the field blank.

GTC Scotland Teacher Induction scheme (GTCSTIS)

Return: DLHE

Entity: Teaching

Page Used:

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Page	Page Element
HESA Returns	Country
Enter DLHE Survey (Section C) self-service	Q22
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return with a Teaching entity only if Country in HESA Returns page = Scotland.

Derivation Steps:

1. Derive from survey record (1 or 2).
2. Do not derive a value and leave the field blank.

Seeking a teaching post (SEEKTEACH)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
Enter DLHE Survey (Section C) self-service	Q25
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return with a Teaching entity.

Derivation Steps:

1. Derive from survey record (1 or 2).
2. If the check box is selected and Teaching.EMPLDTEACH = 2 and Student.STATUS is 01, 02 or 04, then derive as *NULL ERROR*.
3. Do not derive a value and leave the field blank.

Teaching funded (TEACHFUND)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
Enter DLHE Survey (Section C) self-service	Q23

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Page	Page Element
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return with a Teaching entity.

Derivation Steps:

1. If Teaching.EMPLDTEACH = 1, derive from survey record (1, 2, 3, or 4).
2. Do not derive a value and leave the field blank.

Teaching phase (TEACHPHS)

Return: DLHE

Entity: Teaching

Page Used:

Page	Page Element
Enter DLHE Survey (Section C) self-service	Q24
Enter DLHE Survey (Section C) self-service	Newly qualified teacher status – check box

Field Derivation Rule: Include for all survey records in a DLHE return with a Teaching entity.

Derivation Steps:

1. If Teaching.EMPLDTEACH = 1, derive from survey record (1, 2, 3, or 4).
2. Do not derive a value and leave the field blank.

DLHE Return: Study Entity

For each Student entity, if Student.ALLACT5 = *5* or Student.ALLACT6 = *6*, then a Study entity is included in the Student entity and the Study entity fields are derived. Otherwise, a Study entity is not included in the Student entity.

Note: Student.ALLACT5 and Student.ALLACT6 are derived as blank if Student.STATUS is *07* (deceased) or *08* (reply explicitly refused) so in that case a Study entity is not created.

Course name (COURSENAME)

Return: DLHE

Entity: Study

Page Used:

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Page	Page Element
Enter DLHE Survey (Section D) self-service	Q27

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

Derivation Steps:

1. Derive from survey record.
2. Do not derive a value and leave the field blank.

JACS 3.0 – derived from Q27 and Q28 (JACS)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	JACS Subject*

*Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

Derivation Steps:

1. Derive from survey record.
2. Derive as *NULL ERROR*.

JACS 3.0 – derived from Q27 and Q28 (JACS-S2, JACS-S3)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	JACS Subject 2*, JACS Subject 3*

*Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page. Also, the field is enabled only if you enter JACS Subject.

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

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Derivation Steps:

1. Derive from survey record.
2. Do not derive a value and leave the field blank.

How funding further study (STUDYFUND)

Return: DLHE

Entity: Study

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section D) self-service	Q30

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

Derivation Steps:

1. Derive from survey record (01, 02, 03, 04 or 05).
2. Do not derive a value and leave the field blank.

Subject of study, training or research (SUBJECT)

Return: DLHE

Entity: Study

Page Used:

Page	***Page Element***
Enter DLHE Survey (Section D) self-service	Q28

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

Derivation Steps:

1. Derive from survey record.
2. If Study.COURSENAME value does not exist, derive as *NULL ERROR*.
3. Do not derive a value and leave the field blank.

Type of qualification – Q26 (TYPEQUAL)

Return: DLHE

Entity: Study

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Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q26

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

Derivation Steps:

1. Derive from survey record (01 to 07 or 98).
2. Derive as NULL ERROR.

Name of university or college (UCNAME)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q29

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

Derivation Steps:

1. Derive from survey record.
2. Do not derive a value and leave the field blank.

Note: The system does not derive a value and leaves this field as blank if Study.UCPROV value does not exist or is derived as *6* (unknown) and the institution name is not provided for Q29.

University or college providing study – Derived from Q29 (UCPROV)

Return: DLHE

Entity: Study

Page Used:

Page	Page Element
Enter DLHE Survey (Section D) self-service	Q29*

*Not available in student self-service. The system displays this field only when you access the self-service page by clicking the Enter Survey button on the Survey Management page.

Field Derivation Rule: Include for all survey records in a DLHE return with a Study entity.

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Derivation Steps:

1. Derive from survey record.
2. Do not derive a value and leave the field blank.

Note: The system derives this field prior to Study.UCNAME

Unistats/KIS Return: Institution Entity

The Create Extract process creates a single Institution entity and saves it to the Institution Extract record (SSR_HE_INST_EXT).

Where fields are derived from the Institution HESA Data record, values are selected from the most recent effective dated record where the effective date falls on or before the end of the reporting period. Values are stored in the Institution Fields Extract record (SSR_HE_INTEX_FL).

National Scholarship Programme Participation (NSP)

Return: Unistats/KIS

Entity: Institution

Page Used:

Page	*Page Element*
Institution HESA Data	NSP

Field Derivation Rule: If Country = England, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Derive as *NULL ERROR*.

Franchise UK Provider Reference Number (OTHERINST)

Return: Unistats/KIS

Entity: Institution

Page Used:

Page	*Page Element*
Institution HESA Data	OTHERINST

Field Derivation Rule: Include for all Institution entities.

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Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Do not derive a value and leave the field blank.

Note: Nine fields are provided rather than the maximum 100 available.

Franchise UK Provider Reference Number (OTHERINST2 to 9)

Return: Unistats/KIS

Entity: Institution

Page Used:

Page	*Page Element*
Institution HESA Data	OTHERINST2 to OTHERINST9

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Do not derive a value and leave the field blank.

Record Type Indicator (RECID)

Return: Unistats/KIS

Entity: Institution

Pages Used:

Page	*Page Element*
Reporting Periods (Records and Enrollment > HESA Reporting > HESA Returns Setup > Reporting Periods)	Record Year
Returns (Records and Enrollment > HESA Reporting > HESA Returns Setup > Returns)	Record ID

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive as YYNNN, where *YY* is the final two digits of the Record Year (for example, 09 for 2009) and *NNN* is the 3-digit Record ID for the seeded return.

The seeded record ID for the Unistats/KIS return is *061*.

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Student Union URL (SUURL)

Return: Unistats/KIS

Entity: Institution

Page Used:

Page	*Page Element*
Institution HESA Data	Student Union URL

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Derive as *NULL ERROR*.

UK Provider Reference Number (UKPRN)

Return: Unistats/KIS

Entity: Institution

Page Used:

Page	*Page Element*
HESA Configuration	UKPRN

Field Derivation Rule: Include for all Institution entities.

Derivation Steps:

1. Derive from the HESA Returns page.
2. Derive as *NULL ERROR*.

Unistats/KIS Return: Location Entity

The Create Extract process creates one or more Location entities in the Location Extract Data record (SSR_HE_LOCN_EXT) for the single Institution extract record for the Unistats/KIS return. As with the Institution entity fields, values are selected from the most recent effective dated Institution HESA Data record where the effective date is on or before the reporting period end date.

The LOCID and LOCNAME are derived as part of the initial entity selection and stored in the Location Extract Data record (SSR_HE_LOCN_EXT). The remaining fields are derived and stored in the Location Fields Extract record (SSR_HE_LOC_EXFL).

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Accommodation Cost URL (ACCOMURL)

Return: Unistats/KIS

Entity: Location

Page Used:

Page	*Page Element*
Institution HESA Data (Locations group box)	ACCOMURL

Field Derivation Rule: Include for all Location entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Derive as *NULL ERROR*.

Location Latitude (LATITUDE)

Return: Unistats/KIS

Entity: Location

Page Used:

Page	*Page Element*
Institution HESA Data (Locations group box)	LATITUDE

Field Derivation Rule: If Location.INSTBEDS exists, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Derive as *NULL ERROR*.

Location Identifier (LOCID)

Return: Unistats/KIS

Entity: Location

Page Used:

Page	*Page Element*
Institution HESA Data (Locations group box)	Location ID

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Field Derivation Rule: Include for all Location entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.

Location Identifier Name (LOCNAME)

Return: Unistats/KIS

Entity: Location

Page Used:

Page	***Page Element***
Institution HESA Data (Locations group box)	Location Name

Field Derivation Rule: Include for all Location entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.

Location UKPRN (LOCUKPRN)

Return: Unistats/KIS

Entity: Location

Page Used:

Page	***Page Element***
Institution HESA Data (Locations group box)	LOCUKPRN

Field Derivation Rule: Include for all Location entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Do not derive a value and leave the field blank.

Location Longitude (LONGITUDE)

Return: Unistats/KIS

Entity: Location

Page Used:

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Page	Page Element
Institution HESA Data (Locations group box)	LONGITUDE

Field Derivation Rule: Include for all Location entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Derive as *NULL ERROR*.

Student Union URL (SUURL)

Return: Unistats/KIS

Entity: Location

Page Used:

Page	Page Element
Institution HESA Data (Locations group box)	Student Union URL

Field Derivation Rule: Include for all Location entities.

Derivation Steps:

1. Derive from the Institution HESA Data page.
2. Do not derive a value and leave the field blank.

Note: The return uses this field when the location has a different student union. This field is also included in the Institution entity.

Unistats/KIS Return: KISCourse Entity

The Create Extract process creates records in the Course Extract Data record (SSR_HE_CRS_EXT) in a similar way to the Course entity in the student return, except that academic plans and academic subplans are included based on whether *KIS Type* has been defined rather than whether *Report to HESA* has been selected. For each academic plan or subplan the effective dated record relevant to the start date of the reporting period is considered.

When selecting records, the *Null Errors Only*, *Validation Errors Only*, *Academic Plan* and *Academic Sub-Plan* parameters of the Create Extract process are considered.

The KISCOURSEID is derived as part of the initial entity selection and stored in the Course Extract Data record (in SSR_HE_COURSEID). The value is derived as the subplan or plan code. The remaining fields are derived and stored in the Course Fields Extract record (SSR_HE_CRSEX_FL).

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Dependent fields are derived first including KISTYPE and UCASCOURSEID that are required for the derivation of a number of other fields.

The most recent effective dated records on or before the reporting period end date are considered for programs, plans or subplans. The exception to this is KISTYPE that is derived from the effective dated record relevant to the start of the reporting period to be consistent with the logic for including plans and subplans in the KISCourse entity.

Assessment Methods URL (ASSURL)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Links group box)	Assessment Methods URL
Plan HESA Data (KIS Course Links group box)	Assessment Methods URL
Sub-Plan HESA (KIS Course Links group box)	Assessment Methods URL

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 3, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. Derive as *NULL ERROR*.

Course Page URL (CRSEURL)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Links group box)	Course Page URL
Plan HESA Data (KIS Course Links group box)	Course Page URL
Sub-Plan HESA (KIS Course Links group box)	Course Page URL

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Field Derivation Rule: Include for all KISCourse entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. If KISTYPE = 1 or 2, derive as *NULL ERROR*.

Distance Learning Only (DISTANCE)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Data group box)	DISTANCE
Plan HESA Data (KIS Course Data group box)	DISTANCE
Sub-Plan HESA (KIS Course Data group box)	DISTANCE

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Employment Details URL (EMPLOYURL)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

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Page	Page Element
Program HESA Data (KIS Course Links group box)	Employment Details URL
Plan HESA Data (KIS Course Links group box)	Employment Details URL
Sub-Plan HESA (KIS Course Links group box)	Employment Details URL

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 3, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. Derive as *NULL ERROR*.

Foundation Year Availability (FOUNDATION)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	Page Element
Program HESA Data (KIS Course Data group box)	FOUNDATION
Plan HESA Data (KIS Course Data group box)	FOUNDATION
Sub-Plan HESA (KIS Course Data group box)	FOUNDATION

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

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Subject of Course – HECOS

For HECOS 1 to 5, records are selected from HECoS Subjects defined at Sub-Plan, Plan or Program level (maximum 5 records). Records are ordered with the highest percentage first and then used in descending order for HECOS 1 to 5. The values are selected from the most recent effective-dated records where the effective date falls on or before the reporting period end date.

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (HECoS Subjects)	Subject
Plan HESA Data (HECoS Subjects)	Subject
Sub-Plan HESA (HECoS Subjects)	Subject
Plan HESA Data (ILR Aims)	ILR Year
Sub-Plan HESA (ILR Aims)	ILR Year
Plan HESA Data (HESA Course)	HESA Year
Sub-Plan HESA (HESA Course)	HESA Year

Field Derivation Rule: Derive a value if the following conditions are met:

- HESA Year is not defined for Sub-Plan or Plan (that is, HESACourse does not exist)
- ILR Year is not defined for Sub-Plan or Plan (that is, ILRAims does not exist)

Otherwise, derive as null.

Derivation Steps:

1. If KISCourse entity is based on a Sub-Plan, derive as Subject value from the Sub-Plan HESA (HECoS Subjects) page.
2. Derive as Subject value from the Plan HESA Data (HECoS Subjects) page.
3. Derive as Subject value from the Program HESA Data (HECoS Subjects) page.
4. Derive as *NULL ERROR*.

Subject of Course – HECOS (HECOS2, HECOS3, HECOS4, HECOS5)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

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Page	Page Element
Program HESA Data (HECoS Subjects)	Subject
Plan HESA Data (HECoS Subjects)	Subject
Sub-Plan HESA (HECoS Subjects)	Subject

Field Derivation Rule: If KISCourse.HECOS1 is not null or NULL ERROR, derive a value.

Derivation Steps:

1. If HECOS1 is derived from a Sub-Plan (Step 1), derive as Subject value from the Sub-Plan HESA (HECoS Subjects) page.
2. If HECOS1 is derived from a Plan (Step 2), derive as Subject value from the Plan HESA Data (HECoS Subjects) page.
3. If HECOS1 is derived from a Program (Step 3), derive as Subject value from the Program HESA Data (HECoS Subjects) page.
4. Derive as null.

Because HECOS1 is the only entity required, the other fields are derived as null if HECoS Subjects are not found or only one is defined.

Honours Award Provision (HONOURS)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	Page Element
Program HESA Data (KIS Course Data group box)	HONOURS
Plan HESA Data (KIS Course Data group box)	HONOURS
Sub-Plan HESA (KIS Course Data group box)	HONOURS

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.

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5. Use default.
6. Derive as *NULL ERROR*.

Subject of Course – Full JACS (JACSA)

For JACSA, JACSB and JACSC, records are selected from Course Subjects defined at Subplan, Plan or Program level (maximum 3 records) in the same way as for the CourseSubject entity in the Student return. Records are ordered with the highest percentage first and then used in order for JACSA, JACSB and then JACSC.

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (Course Subjects group box)	Subject
Plan HESA Data (Course Subjects group box)	Subject
Sub-Plan HESA (Course Subjects group box)	Subject
Plan HESA Data (ILR Aims group box)	ILR Year
Sub-Plan HESA (ILR Aims group box)	ILR Year
Plan HESA Data (HESA Course group box)	HESA Year
Sub-Plan HESA (ILR Aims group box)	HESA Year

Field Derivation Rule: Derive a value if the following conditions are met:

- KISCourse.KISTYPE = 1
- HESA Year is not defined for subplan or plan (that is, HESACourse does not exist)
- ILR Year is not defined for subplan or plan (that is, ILRAims does not exist)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive as Subject value from the Sub-Plan HESA page.
2. Derive as Subject value from the Plan HESA Data page.
3. Derive as Subject value from the Program HESA Data page.
4. Derive as *NULL ERROR*.

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Subject of course – Full JACS (JACSB and JACSC)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (Course Subjects group box)	Subject
Plan HESA Data (Course Subjects group box)	Subject
Sub-Plan HESA (Course Subjects group box)	Subject

Field Derivation Rule: If KISCourse.JACSA is not blank or is *NULL ERROR*, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If JACSA is derived from a subplan (Step 1), derive as Subject value from the Sub-Plan HESA page.
2. If JACSA is derived from a plan (Step 2), derive as Subject value from the Plan HESA Data page.
3. If JACSA is derived from a program (Step 3), derive as Subject value from the Program HESA Data page.
4. Do not derive a value and leave the field blank.

KIS Course Mode (KISAIM)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Data group box)	KISAIM
Plan HESA Data (KIS Course Data group box)	KISAIM
Sub-Plan HESA (KIS Course Data group box)	KISAIM

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.

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3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

KIS Course Mode (KISMODE)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Data group box)	KISMODE
Plan HESA Data (KIS Course Data group box)	KISMODE
Sub-Plan HESA (KIS Course Data group box)	KISMODE

Field Derivation Rule: Include for all KISCourse entities.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Change of Course Location (LOCCHNGE)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Data group box)	LOCCHNGE
Plan HESA Data (KIS Course Data group box)	LOCCHNGE

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Page	Page Element
Sub-Plan HESA (KIS Course Data group box)	LOCCHNGE

Field Derivation Rule: Derive a value only if KISCourse.DISTANCE = 0 or 2.

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Learning and Teaching Methods URL (LTURL)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	Page Element
Program HESA Data (KIS Course Links group box)	Learning/Teaching Methods URL
Plan HESA Data (KIS Course Links group box)	Learning/Teaching Methods URL
Sub-Plan HESA (KIS Course Links group box)	Learning/Teaching Methods URL

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 3, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. Derive as *NULL ERROR*.

NHS Funded Students (NHS)

Return: Unistats/KIS

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Entity: KISCourse

Pages Used:

Page	Page Element
Program HESA Data (KIS Course Data group box)	NHS
Plan HESA Data (KIS Course Data group box)	NHS
Sub-Plan HESA (KIS Course Data group box)	NHS

Field Derivation Rule: Derive a value if the following conditions are met:

- KISCourse.KISTYPE = 1 or 2
- HESACourse does not exist
- ILRAims does not exist

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Length of Courses (NUMSTAGE)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	Page Element
Program HESA Data (KIS Course Data group box)	NUMSTAGE
Plan HESA Data (KIS Course Data group box)	NUMSTAGE
Sub-Plan HESA (KIS Course Data group box)	NUMSTAGE

Field Derivation Rule: If KISCourse.KISMODE = 1 (full-time) or 3 (both), derive a value. Otherwise, derive as null.

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Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as NULL ERROR.

Related KIS 2, 3 (RELATEDKIS2, RELATEDKIS3)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Data group box)	RELATEDKIS2, RELATEDKIS3
Plan HESA Data (KIS Course Data group box)	RELATEDKIS2, RELATEDKIS3
Sub-Plan HESA (KIS Course Data group box)	RELATEDKIS2, RELATEDKIS3

Field Derivation Rule: If KISCourse.RELATEDKIS is not blank or is *NULL ERROR*, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If RELATEDKIS is derived from Step 2, derive from the Sub-Plan HESA page.
2. If RELATEDKIS is derived from Step 3, derive from the Plan HESA Data page.
3. If RELATEDKIS is derived from Step 4, derive from the Program HESA Data page.
4. Do not derive a value and leave the field blank.

Sandwich Year Availability (SANDWICH)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Data group box)	SANDWICH

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Page	Page Element
Plan HESA Data (KIS Course Data group box)	SANDWICH
Sub-Plan HESA (KIS Course Data group box)	SANDWICH

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Support Details URL (SUPPORTURL)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	Page Element
Program HESA Data (KIS Course Links group box)	SUPPORTURL
Plan HESA Data (KIS Course Links group box)	SUPPORTURL
Sub-Plan HESA (KIS Course Links group box)	SUPPORTURL

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. Use default.
5. Derive as null.

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Teaching Institution UK Provider Reference Number (TEACHUKPRN)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	*Page Element*
Program HESA Data (KIS Course Data group box)	TEACHUKPRN
Plan HESA Data (KIS Course Data group box)	TEACHUKPRN
Sub-Plan HESA (KIS Course Data group box)	TEACHUKPRN

Field Derivation Rule: Derive a value if the following conditions are met:

- HESACourse does not exist
- ILRAims does not exist

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Do not derive a value and leave the field blank.

Note: Three fields are provided for TEACHUKPRN in Campus Solutions rather than the maximum 50 allowed by HESA.

Teaching Institution UK Provider Reference Number (TEACHUKPRN2, TEACHUKPRN3)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	*Page Element*
Program HESA Data (KIS Course Data group box)	TEACHUKPRN2, TEACHUKPRN3

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Page	Page Element
Plan HESA Data (KIS Course Data group box)	TEACHUKPRN2, TEACHUKPRN3
Sub-Plan HESA (KIS Course Data group box)	TEACHUKPRN2, TEACHUKPRN3

Field Derivation Rule: If KISCourse.TEACHUKPRN is not blank, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. Do not derive a value and leave the field blank.

Course Title (TITLEK)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	Page Element
Plan HESA Data	KIS Title Course Title
Academic Plan Table	Description (maximum 30 characters)
Sub-Plan HESA	KIS Title Course Title
Academic Sub-Plan Table	Description (maximum 30 characters)

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive as KIS Title from the Sub-Plan HESA page.
2. If KISCourse entity is based on a subplan, derive as Course Title from the Sub-Plan HESA page.
3. If KISCourse entity is based on a subplan, derive as combination of plan and subplan descriptions separated by a space.
4. Derive as KIS Title from the Plan HESA Data page.

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5. Derive as Course Title from the Plan HESA Data page.
6. Derive as plan description.

Note: Because the TITLEK is derived as part of the initial creation of the KIS Course entity, the derivation steps are not captured in the Course Extract Field record and so TITLEK is not displayed on the Course Extract Data page.

Teacher Training Course (TTCID)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	*Page Element*
Program HESA Data	TTCID
Plan HESA Data	TTCID
Sub-Plan HESA	TTCID
Plan HESA Data (ILR Aims group box)	ILR Year
Sub-Plan HESA (ILR Aims group box)	ILR Year
Plan HESA Data (HESA Course group box)	HESA Year
Sub-Plan HESA (ILR Aims group box)	HESA Year

Field Derivation Rule: Derive a value if the following conditions are met:

- KISCourse.KISTYPE = 1
- HESA Year is not defined for subplan or plan (that is, HESACourse does not exist)
- ILR Year is not defined for subplan or plan (that is, ILRAims does not exist)

Do not derive a value and leave the field blank, if the conditions are not met.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.

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6. Derive as *NULL ERROR*.

Note: This field is derived as per Course.TTCID in the Student return.

UCAS Programme Code for the Course (UCASPROGID)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Plan HESA Data (KIS Course Data group box)	UCASPROGID
Sub-Plan HESA (KIS Course Data group box)	UCASPROGID

Field Derivation Rule: Derive a value if KISCourse.KISTYPE = 1 or 2. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Do not derive a value and leave the field blank.

Application UKPRN (UKPRNAPPLY)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	***Page Element***
Program HESA Data (KIS Course Data group box)	UKPRNAPPLY
Plan HESA Data (KIS Course Data group box)	UKPRNAPPLY
Sub-Plan HESA (KIS Course Data group box)	UKPRNAPPLY

Field Derivation Rule: Include for all KISCourse entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

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4. Do not derive a value and leave the field blank.

Year Abroad Availability (YEARABROAD)

Return: Unistats/KIS

Entity: KISCourse

Pages Used:

Page	*Page Element*
Program HESA Data (KIS Course Data group box)	YEARABROAD
Plan HESA Data (KIS Course Data group box)	YEARABROAD
Sub-Plan HESA (KIS Course Data group box)	YEARABROAD

Field Derivation Rule: If KISCourse.KISTYPE = 1 or 2, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. Use constant.
2. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
3. Derive from the Plan HESA Data page.
4. Derive from the Program HESA Data page.
5. Use default.
6. Derive as *NULL ERROR*.

Unistats/KIS Return: Accreditation Entity

The Create Extract process creates up to ten Accreditation entities in the Accreditation Extract Data record (SSR_HE_ACR_EXT) for each KISCourse entity where the derived KISTYPE = 1 or 2. If no Accreditation records are defined for the academic plan or subplan then no entities are created. KISTYPE defaults to 1.

The fields are derived and stored in the Accreditation Fields Extract record (SSR_HE_ACREX_FL).

Accreditation Type (ACCTYPE)

Return: Unistats/KIS

Entity: Accreditation

Pages Used:

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Page	Page Element
Program HESA Data (Accreditation group box)	Accreditation Type
Plan HESA Data (Accreditation group box)	Accreditation Type
Sub-Plan HESA (Accreditation group box)	Accreditation Type

Field Derivation Rule: Include for all Accreditation entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.

Accreditation Dependency (ACCDEPEND)

Return: Unistats/KIS

Entity: Accreditation

Pages Used:

Page	Page Element
Program HESA Data (Accreditation group box)	Dependency (check box)
Plan HESA Data (Accreditation group box)	Dependency (check box)
Sub-Plan HESA (Accreditation group box)	Dependency (check box)

Field Derivation Rule: Include for all Accreditation entities.

Derivation Steps:

1. If ACCTYPE is derived from Step 1 (subplan), derived from the same Accreditation record. If the check box is selected, *1* is derived, otherwise *0* is derived.
2. If ACCTYPE is derived from Step 2 (plan), derived from the same Accreditation record. If the check box is selected, *1* is derived, otherwise *0* is derived.
3. If ACCTYPE is derived from Step 3 (program), derived from the same Accreditation record. If the check box is selected, *1* is derived, otherwise *0* is derived.

Accreditation Dependency URL (ACCDEPENDURL)

Return: Unistats/KIS

Entity: Accreditation

Pages Used:

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Page	Page Element
Program HESA Data (Accreditation group box)	Dependency URL
Plan HESA Data (Accreditation group box)	Dependency URL
Sub-Plan HESA (Accreditation group box)	Dependency URL

Field Derivation Rule: If Accreditation.ACCDEPEND = 1, derive a value. Otherwise, do not derive a value and leave the field blank.

Derivation Steps:

1. If ACCTYPE is derived from Step 1 (subplan), derived from the same Accreditation record.
2. If ACCTYPE is derived from Step 2 (plan), derived from the same Accreditation record.
3. If ACCTYPE is derived from Step 3 (program), derived from the same Accreditation record.

Unistats/KIS Return: CourseLocation Entity

The Create Extract process creates up to three CourseLocation entities for each KISCourse record where KISCourse.KISTYPE = 1 or 2, where the Location ID fields are defined for the subplan, plan or program. If Location ID values are not defined, the process does not create the entities.

Location Identifier (LOCID)

Return: Unistats/KIS

Entity: CourseLocation

Pages Used:

Page	Page Element
Program HESA Data (KIS Course Data group box)	LOCID, LOCID2, LOCID3
Plan HESA Data (KIS Course Data group box)	LOCID, LOCID2, LOCID3
Sub-Plan HESA (KIS Course Data group box)	LOCID, LOCID2, LOCID3

Derivation Steps: Include for all CourseLocation entities.

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Derive from the Program HESA Data page.
4. Use default that is defined for LOCID.

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UCAS Course Code for the Course (UCASCOURSEID)

Return: Unistats/KIS

Entity: CourseLocation

Pages Used:

Page	*Page Element*
Plan HESA Data (KIS Course Data group box)	UCASCOURSEID, UCASCOURSEID2, UCASCOURSEID3
Sub-Plan HESA (KIS Course Data group box)	UCASCOURSEID, UCASCOURSEID2, UCASCOURSEID3
UCAS Course (Set Up SACR, Product Related, Recruiting and Admissions, UCAS, Mappings, UCAS Course)	UCAS Course Code

Derivation Steps: Include for all CourseLocation entities.

Derivation Steps:

1. If LOCID is derived in Step 1 (that is, subplan) from LOCID, derive UCASCOURSEID value from the Sub-Plan HESA page.
2. If LOCID is derived in Step 1 (that is, subplan) from LOCID, map the combination of subplan and plan to a UCAS course code via the UCAS mappings on the UCAS Course page. Refer to the following notes on UCAS Course mappings.
3. If LOCID is derived in Step 1 (that is, subplan) from LOCID2, derive UCASCOURSEID2 value from the Sub-Plan HESA page.
4. If LOCID is derived in Step 1 (that is, subplan) from LOCID3, derive UCASCOURSEID3 value from the Sub-Plan HESA page.
5. If LOCID is derived in Step 1 (that is, subplan) from LOCID, LOCID2 or LOCID3, do not derive a value and leave the field blank.
6. If LOCID is derived in Step 2 (that is, plan) from LOCID, derive UCASCOURSEID value from the Plan HESA Data page.
7. If LOCID is derived in Step 2 (that is, plan) from LOCID, map the plan to a UCAS course code via the UCAS mappings on the UCAS Course page. Refer to the following notes on UCAS Course mappings.
8. If LOCID is derived in Step 2 (that is, plan) from LOCID2, derive UCASCOURSEID2 value from the Plan HESA Data page.
9. If LOCID is derived in Step 2 (that is, plan) from LOCID3, derive UCASCOURSEID3 value from the Plan HESA Data page.
10. If LOCID is derived in Step 2 (that is, plan) from LOCID, LOCID2 or LOCID3, do not derive a value and leave the field blank.

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11. If LOCID is derived in Step 3 (that is program) or Step 4 (that is default), do not derive a value and leave the field blank.

Notes on 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 subplan (for step 2) or the plan (for step 7) is defined for the UCAS Course. The mappings are only done for entities derived from LOCID and not for entities derived for LOCID2 or LOCID3.

Step 2 - For subplans, records are selected from SAD_UC_COURSE where the academic institution matches the institution of the Unistats/KIS return, the academic subplan 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 (that is, more than one UCAS Course Code is found), *NULL ERROR* is derived.

Step 7 - For plans, records are selected from SAD_UC_COURSE where the academic institution matches the institution of the Unistats/KIS return, the academic plan matches the KISCOURSEID, the subplan 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 (that is, more than one UCAS Course Code is found), *NULL ERROR* is derived.

Unistats/KIS Return: HESACourse Entity

The Create Extract process creates one or more HESACourse entities in the HESA Course Extract Data record (SSR_HE_HCR_EXT) for each KIS Course entity where the derived KISTYPE = 1. If no HESACourse records are defined for the academic plan or subplan then no entities are created.

The fields are derived and stored in the HESA Course Fields Extract record (SSR_HE_HCREX_FL).

HESA Course Identifier (HESACOURSEID)

Return: Unistats/KIS

Entity: HESACourse

Pages Used:

Page	***Page Element***
Plan HESA Data (HESA Course group box)	Course ID
Sub-Plan HESA (HESA Course group box)	Course ID

Field Derivation Rule: Include for all HESACourse entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.

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2. Derive from the Plan HESA Data page.

Note: Course ID is mandatory to define a HESA Course record.

Reporting Year of HESA Course (HESAYEAR)

Return: Unistats/KIS

Entity: HESACourse

Pages Used:

Page	*Page Element*
Plan HESA Data (HESA Course group box)	HESA Year
Sub-Plan HESA (HESA Course group box)	HESA Year

Field Derivation Rule: Include for all HESACourse entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.

Registering Institution UK Provider Reference Number (REGUKPRN)

Return: Unistats/KIS

Entity: HESACourse

Pages Used:

Page	*Page Element*
Plan HESA Data (HESA Course group box)	Registering Institution UKPRN
Sub-Plan HESA (HESA Course group box)	Registering Institution UKPRN

Field Derivation Rule: Include for all HESACourse entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Do not derive a value and leave the field blank.

Note: Only non-zero values are derived.

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Teaching Institution UK Provider Reference Number (TEACHUKPRN)

Return: Unistats/KIS

Entity: HESACourse

Pages Used:

Page	*Page Element*
Plan HESA Data (HESA Course group box)	Teaching Institution UKPRN
Sub-Plan HESA (HESA Course group box)	Teaching Institution UKPRN

Field Derivation Rule: Include for all HESACourse entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Do not derive a value and leave the field blank.

Note: Only non-zero values are derived.

Unistats/KIS Return: ILRAims Entity

The Create Extract process creates one or more ILRAims entities in the ILRAims Extract Data record (SSR_HE_ILR_EXT) for each KISCourse entity where the derived KISTYPE = 1. If no ILRAims records are defined for the academic plan or subplan then no entities are created.

The fields are derived and stored in the ILRAims Extract record (SSR_HE_ILREX_FL).

LAD/LARA Qualification Aim Course Code (ILRAIMID)

Return: Unistats/KIS

Entity: ILRAims

Pages Used:

Page	*Page Element*
Plan HESA Data (ILR Aims group box)	ILR Aim
Sub-Plan HESA (ILR Aims group box)	ILR Aim

Field Derivation Rule: Include for all ILRAims entities.

Derivation Steps:

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1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.

Year of ILR Course (ILRYEAR)

Return: Unistats/KIS

Entity: ILRAims

Pages Used:

Page	*Page Element*
Plan HESA Data (ILR Aims group box)	ILR Year
Sub-Plan HESA (ILR Aims group box)	ILR Year

Field Derivation Rule: Include for all ILRAims entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.

Registering Institution UK Provider Reference Number (REGUKPRN)

Return: Unistats/KIS

Entity: ILRAims

Pages Used:

Page	*Page Element*
Plan HESA Data (ILR Aims group box)	Registering Institution UKPRN
Sub-Plan HESA (ILR Aims group box)	Registering Institution UKPRN

Field Derivation Rule: Include for all ILRAims entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Do not derive a value and leave the field blank.

Note: Only non-zero values are derived.

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Teaching Institution UK Provider Reference Number (TEACHUKPRN)

Return: Unistats/KIS

Entity: ILRAims

Pages Used:

Page	*Page Element*
Plan HESA Data (ILR Aims group box)	Teaching Institution UKPRN
Sub-Plan HESA (ILR Aims group box)	Teaching Institution UKPRN

Field Derivation Rule: Include for all ILRAims entities.

Derivation Steps:

1. If KISCourse entity is based on a subplan, derive from the Sub-Plan HESA page.
2. Derive from the Plan HESA Data page.
3. Do not derive a value and leave the field blank.

Note: Only non-zero values are derived.

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