

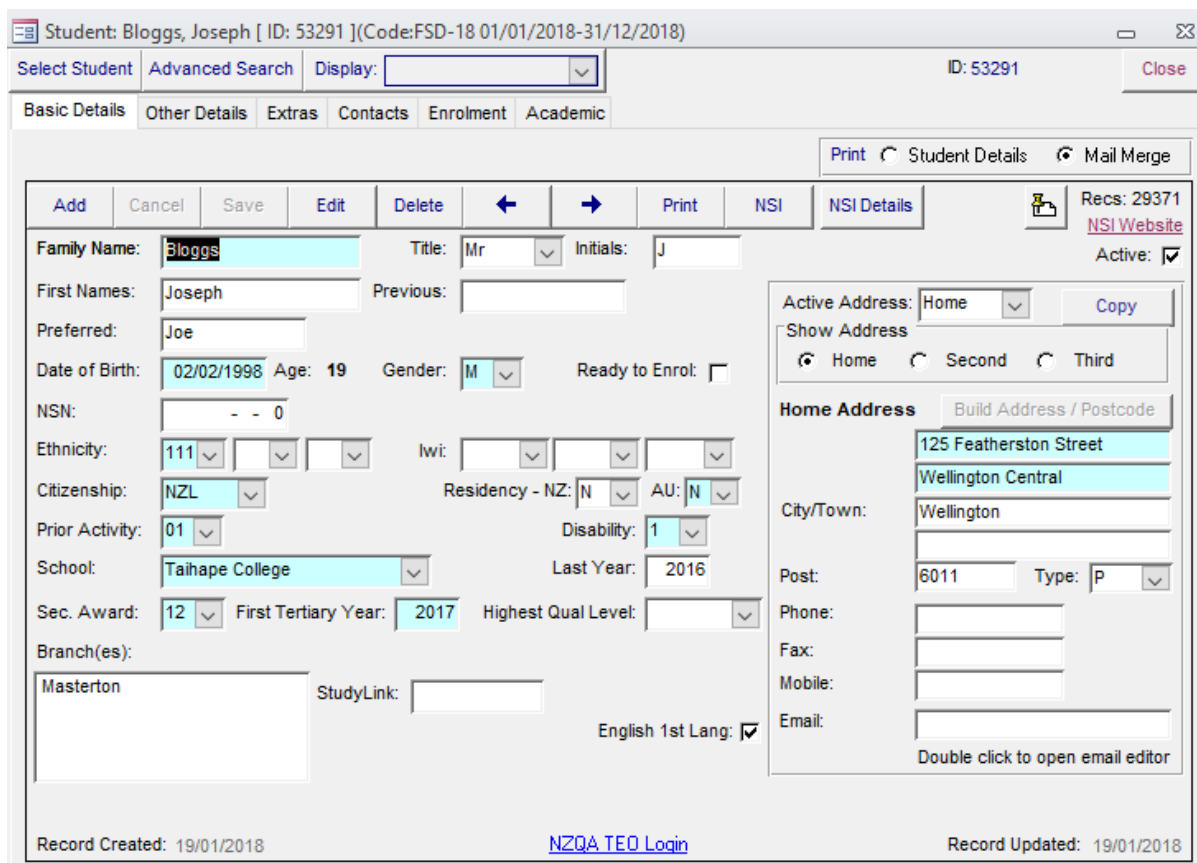
Tip Sheet No.68

Add a New Student

There are two ways to create a student in Take2:

- If you have already added a person on the Persons or Prospects form, tick the Student field on the Persons or Prospects form.
- If the person who is to be a student does not yet exist in the Take2 database, click Students on the Student Management Menu, then click Add.

1. From the Take2 Main Menu click the **Student Management** button.
2. Click on the **Student** button.
3. Click on the **Add** button.
4. Type in the required student details. Add all information required to submit the SDR without errors.



The screenshot shows the 'Student: Bloggs, Joseph [ID: 53291](Code:FSD-18 01/01/2018-31/12/2018)' form. The form is divided into several sections:

- Header:** Includes 'Select Student', 'Advanced Search', 'Display:' dropdown, 'ID: 53291', and a 'Close' button.
- Tabs:** 'Basic Details', 'Other Details', 'Extras', 'Contacts', 'Enrolment', 'Academic'.
- Buttons:** 'Print', 'Student Details', 'Mail Merge'.
- Action Buttons:** 'Add', 'Cancel', 'Save', 'Edit', 'Delete', navigation arrows, 'Print', 'NSI', 'NSI Details', 'Recs: 29371', 'NSI Website', 'Active:
- Personal Information:**
 - Family Name: Bloggs, Title: Mr, Initials: J
 - First Names: Joseph, Previous: [empty]
 - Preferred: Joe
 - Date of Birth: 02/02/1998, Age: 19, Gender: M, Ready to Enrol:
 - NSN: - - 0
 - Ethnicity: 111, Iwi: [empty]
 - Citizenship: NZL, Residency - NZ: N, AU: N
 - Prior Activity: 01, Disability: 1
 - School: Taihape College, Last Year: 2016
 - Sec. Award: 12, First Tertiary Year: 2017, Highest Qual Level: [empty]
 - Branch(es): Masterton, StudyLink: [empty], English 1st Lang:
- Address Section:**
 - Active Address: Home, Copy
 - Show Address: Home, Second, Third
 - Home Address: Build Address / Postcode
 - 125 Featherston Street
 - Wellington Central
 - City/Town: Wellington
 - Post: 6011, Type: P
 - Phone, Fax, Mobile, Email: [empty fields]
 - Double click to open email editor
- Footer:** Record Created: 19/01/2018, NZQA TEQ Login, Record Updated: 19/01/2018

5. Click on the **Save** button to save the details of the new student.
6. Click on the **Close** button to return to the Main Menu, or **Add** to add another student.

NOTES:

- The title bar of the form shows the student's name, ID, and if the student is enrolled the details of their most recent enrolment.
- Click on the Other Details or International Students tab to enter additional information which may be relevant to that student.

Active

When a person or student is added to Take2 this field is automatically ticked as active (the field at the top right of the Students form).

Ethnicity

The ethnicity codes used on the Students form are those required for the SDR. You may not enter the same ethnic origin code more than once for the same student.

Iwi

These fields are relevant only if one of the Ethnicity fields contains the value “211” – i.e. “New Zealand Maori”. If a student has Maori ethnicity you are required to enter at least one iwi value.

Citizenship & Residency

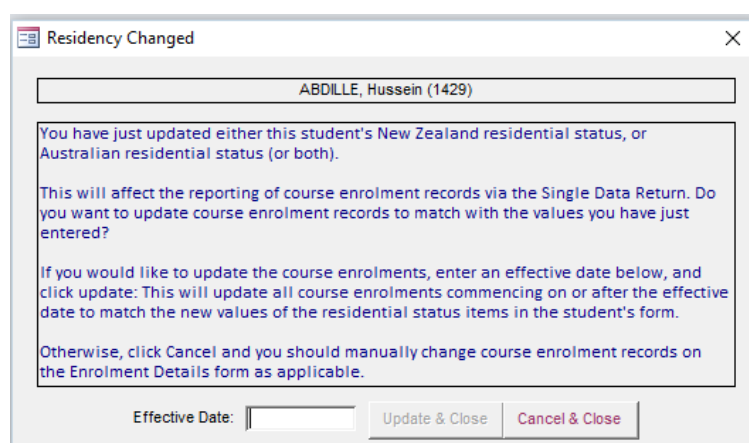
If a student is:

- a NZ permanent resident enter their citizenship in the Citizenship field and enter “Y” in the NZ Resident field.
- an Australian or New Zealand citizen enter a “N” in the Residency NZ and AU fields.
- an international student who does not have residency in NZ or Australia enter “N” in the Residency NZ and AU fields.

Residency

NZ and Australian Residency are entered into course enrolment records in Take2 at the time of enrolment on the Enrolment Defaults form. If a student’s residency is entered incorrectly and needs to be changed modify the values stored in the course enrolment records. Do this from the Students form. When you do so you will be prompted to identify an effective date for the change to flow through to course enrolments. You will be prompted to enter a date the change is effective from.

Note: Residency should be recorded as it was at the start of the enrolment and the current enrolment should not be updated if the student is part way through their current enrolment event.



English First Language

By default this field is ticked to show that the student speaks English as their first language.

Branch

In Take2 a student can be linked to one or more branches. The branch field displays the names of any branch(es) a student has been assigned to.

Disability Indicators

Record a disability code on the basis of information supplied by the student on the enrolment form. Also indicate whether any of your students have accessed disability services.

Note: You can record Disability Details for each student on the Other Details tab of the Students form. This data is not collected through the SDR but could be used for internal management purposes.

Postcodes

- The “Permanent Post Code” is the valid NZ Post Postcode for the student’s main location during the 12 months prior to first enrolling with your organisation.
- The “Term Post Code” is the valid NZ Post Postcode for the student’s current residential location while studying with your organisation.

If a student is living at their permanent address whilst studying with you, then you need only enter one address and one post code. Designate the Post Code Type as either “P” or “O”, depending on whether the student lives and studies in New Zealand. Take2 will report the code twice in the SDR. If the student is living away from their permanent address when studying with you, then you must enter two addresses and two Postcodes. One Post Code Type must be designated as either “P” or “O”, depending on whether the student’s permanent location is in New Zealand. The other Post Code Type must be designated as either “T” or “I”, depending on whether the student term time location is in New Zealand.

Enter “9999” as the post code for any overseas address.

Adding Identical Students

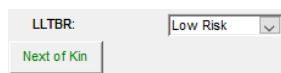
When you add a new student, and after the student’s family name and first names have been entered, the system checks to see if the student is already in your database. If a duplicate record is found the details of this student are displayed and you can make a decision as to whether this is the same person or not. This feature helps to reduce the chance of adding duplicate student records. This feature relies on accurate data entry – if the details are entered differently the second time, Take2 will not be able to tell that the student has been duplicated.

Other Details Tab

The second tab, Other Details, is used for entering less frequently used data and has a Notes field in which you can store free-format text. The tab is also used to store data about employment, status and classification type.

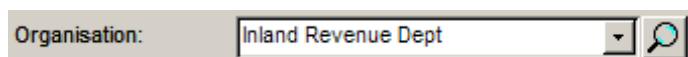
The LLTBR (Likelihood of Long Term Benefit Receipt) field is available as a report filter in the Demographics filter view.

Clicking the Next of Kin button allows you to add and edit details of the student’s next of kin, including contact information. Once some details have been added for next of kin the label on the button will change to green.



Note for the SQL Server edition next of kin details are accessed via the Display dropdown.

If a student is assigned to an organisation then clicking the icon adjacent to that field will open the Organisations form at the appropriate record.



In some circumstances you also need to record a tuition fee amount for foreign fee paying students on this tab. The Foreign Fee field is only displayed when:

- Foreign Fee information outputs to the Student file in the SDR.
- The Residency-NZ code for a student on the Basic Details tab is “N”.

Extras Tab

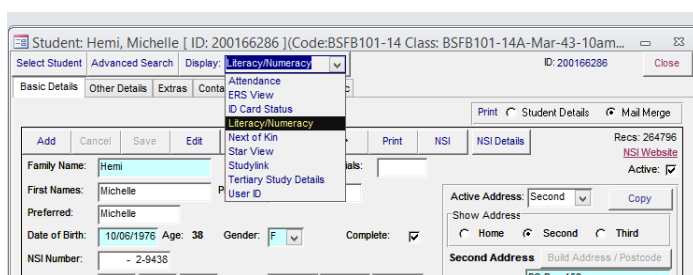
The third tab, Extras, can be used for storing extra data about students, including data stored in User Defined Fields, described below. Three other fields called Resource 1, 2 and 3 are available for recording any resources that the student may have personal access to, such as a computer, tablet or email.

The photo of a student can be displayed on the Extras tab.

The Set Daily Travel Cost Amount button opens a small form on which you can set the daily amount that a student is to be paid for a travel allowance.

Display Combo Field

The Display combo field at the top of the Students form (and Persons and Prospects forms) has a range of items which were previously accessible from individual buttons on these forms. The items that are available will depend on what features of Take2 you use.



The screenshot shows the 'Student: Hemi, Michelle' form. The 'Display' dropdown menu is open, showing options: Attendance, ERS View, ID Card Status, Literacy/Numeracy (highlighted), Next of Kin, Star View, Studylink, Tertiary Study Details, and User ID. The form fields include: Family Name: Hemi, First Names: Michelle, Preferred: Michelle, Date of Birth: 10/06/1976, Age: 38, Gender: F, Complete: , NSI Number: - 2-9438. There are also buttons for Add, Cancel, Save, Edit, Print, NSI, NSI Details, Recs: 264796, NSI Website, Active: , Active Address: Second, Copy, Show Address, Home, Second, Third, and Second Address: Build Address / Postcode.