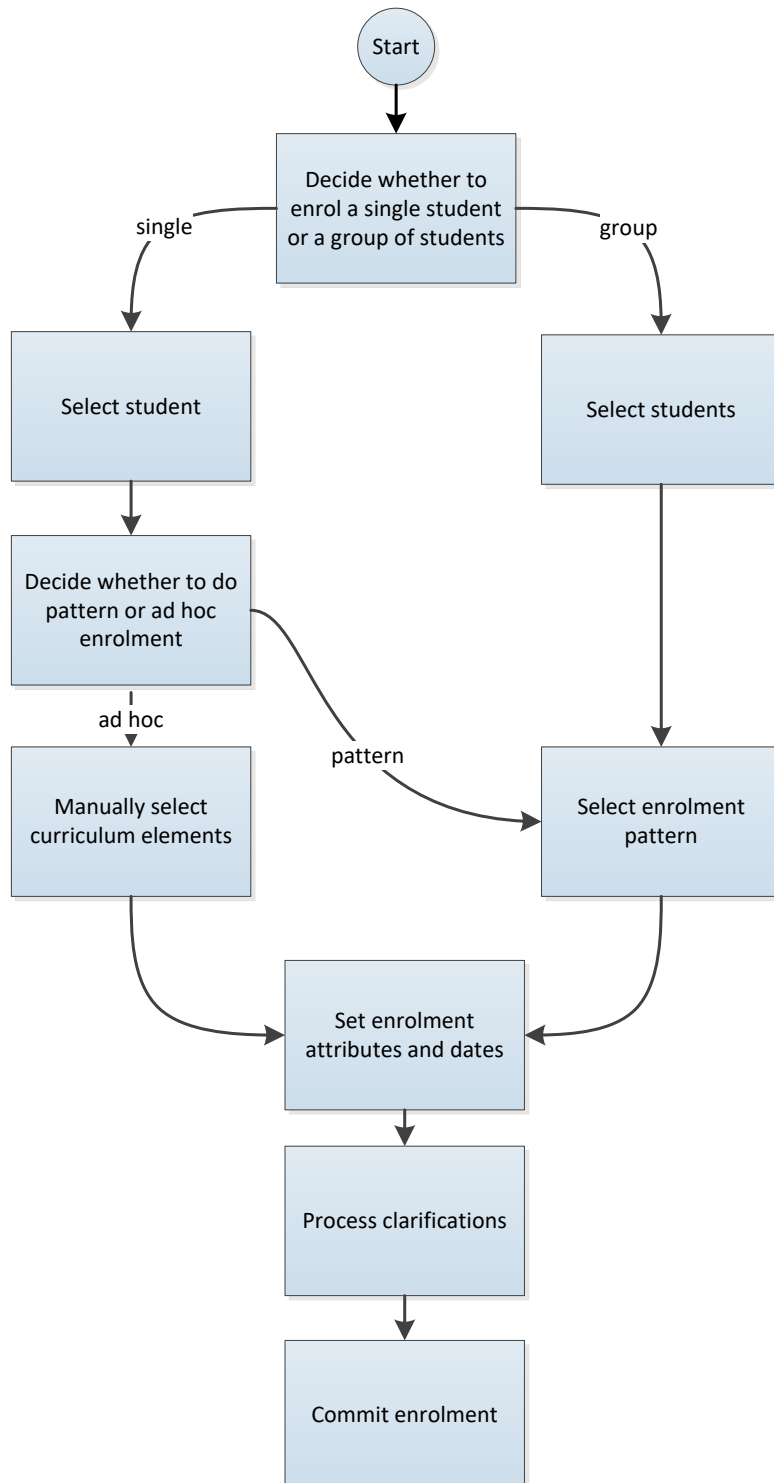


Tip Sheet No.73

Enrol a Student

The process of enrolling students involves a number of steps, as illustrated by the following diagram.



1.1 Selection Process

Selecting a Single Student

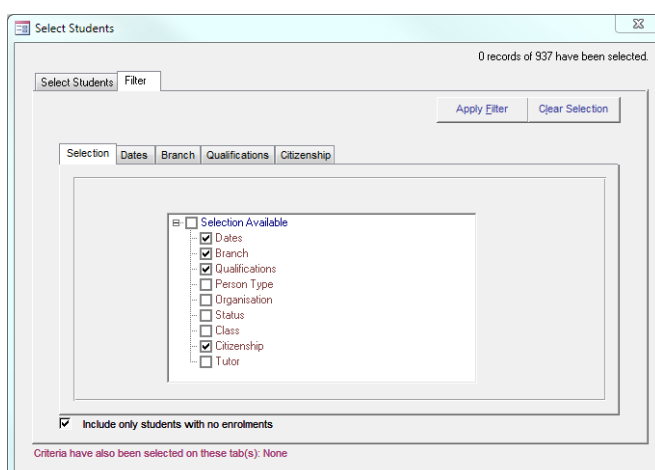
You can create a new enrolment for a single student from the Enrolment tab of the Students form by clicking Ad Hoc Enrolment or Pattern Enrolment.

Alternatively you can create an enrolment from the Enrolment Menu:

- In the Access edition of Take2 click Single Student New and then select either Ad Hoc Enrolment or Pattern Enrolment.
- In the SQL Server edition of Take2 click Single Student, select Ad Hoc or Pattern enrolment type and then click Add.

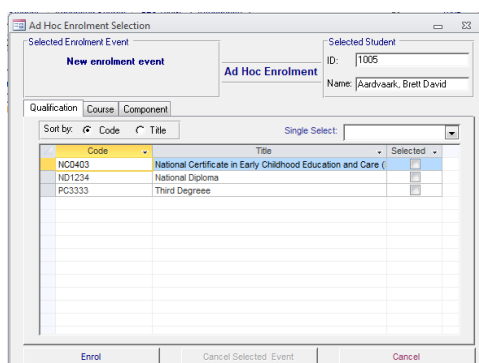
When the Select Students form is opened all active students are displayed on the first tab of the form and none are selected.

- Use the Single Select and Advanced Select options to select individual students one-by-one.
- Once you have set the criteria click Apply Filter and go back to the first tab to tick those students you want to enrol.
- Click OK when finished
- Click Enrol and the Enrolment Defaults form will open.



Ad Hoc Curriculum Selection

When you have selected a student the Ad Hoc Enrolment Selection form is display. On this form you can select the curriculum elements required for the enrolment.

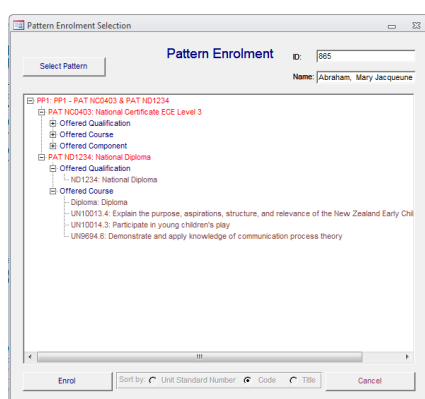


Qualification	Course	Component	Code	Title	Selected
NC2493	National Certificate in Early Childhood Education and Care				<input checked="" type="checkbox"/>
ND1234	National Diploma				<input type="checkbox"/>
PC3333	Third Degree				<input type="checkbox"/>

Select the tab of the element you wish to enrol. If this is a brand new enrolment – i.e. the student has not been enrolled before – you **MUST** select a qualification. When you have selected curriculum elements you click Enrol and complete the enrolment by using the Enrolment Defaults form described below.

Selecting a Pattern

Whenever you opt to create a pattern enrolment you will see the Pattern Enrolment Selection form. Use the Select Pattern button to find the pattern you want to use. The contents of the selected pattern are shown on the enrolment tree.

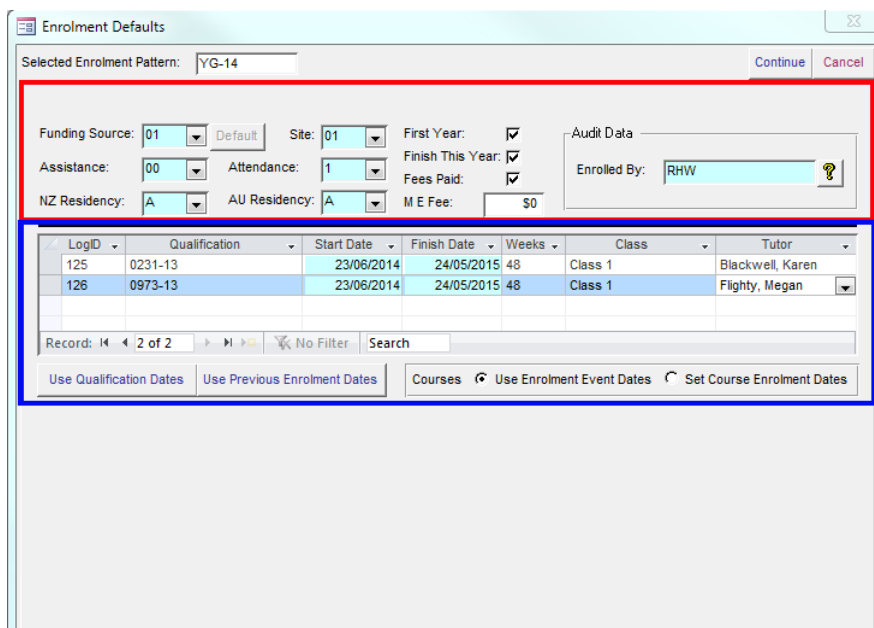


1.2 The Enrolment Defaults Form

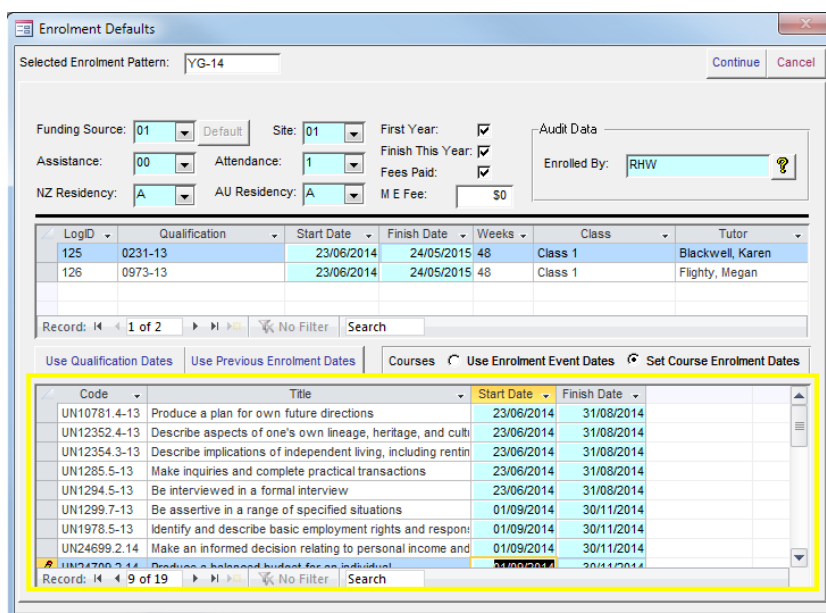
Enrolment Attributes

The top third of the form displays a set of enrolment attributes, some of which will contain default values when the form is opened. You can change these values if necessary and fill in the missing values.

The middle third of the form displays a datasheet with one row for each qualification being enrolled. Only pattern enrolments using a programme pattern can include multiple qualifications. Below the datasheet are two buttons that allow you to look up the start and finish dates to be applied to the enrolment event and course enrolments (if the Use Enrolment Event Dates option is selected).



If you want to assign different start and finish dates to the individual course enrolments select the Set Course Enrolment Dates option and a bottom third of the form will display a new data sheet in which the specific dates can be entered or confirmed.



Code	Title	Start Date	Finish Date
UN10781.4-13	Produce a plan for own future directions	23/06/2014	31/08/2014
UN12352.4-13	Describe aspects of one's own lineage, heritage, and cult	23/06/2014	31/08/2014
UN12354.3-13	Describe implications of independent living, including rentin	23/06/2014	31/08/2014
UN1285.5-13	Make inquiries and complete practical transactions	23/06/2014	31/08/2014
UN1294.5-13	Be interviewed in a formal interview	23/06/2014	31/08/2014
UN1299.7-13	Be assertive in a range of specified situations	01/09/2014	30/11/2014
UN1978.5-13	Identify and describe basic employment rights and respons	01/09/2014	30/11/2014
UN24699.2.14	Make an informed decision relating to personal income and	01/09/2014	30/11/2014
UN24700.2.14	Produce a balanced budget for an individual	01/09/2014	30/11/2014

Attributes Defined

In the list below the underlined fields contain values that are used in the Single Data Return to TEC and the Ministry of Education.

Other Defaults:

- Funding Source – Take2 looks up this default value from the Site Details form. You can over-ride the default value. For example, if the default on the Site Details form is “25” for student achievement component funding and you are currently enrolling an YG funded student, you would need to change the code from “25” to “22”. Note that the value that you enter here is applied to both qualification and course enrolment records.

- Default button – This button is only available when the student(s) is being enrolled into a single qualification. Clicking the button will insert a funding source code into the Funding Source field, looked up from the default funding source assigned to the qualification into which the student is enrolling. If no default funding source has been assigned to the qualification the button is disabled.
- Assistance – For New Zealand citizens, Australian citizens, and NZ and Australian Permanent Residents use “00”.
- NZ & AU Residency – Since a student’s residency values are stored on the Students form (but can change over time) you would normally use the “A” for Assign from value entered on Students form option, however you can also select the “Y” or “N” values as appropriate.
- Attendance – The default is set on the Site Details form and, unless you are predominantly a distance education provider it should be “1” for intramural.
- Site – The default is set on the Site Details form. The code for your main campus should be “01”. For distance education the code should be “98”.
- Finish This Year – The value defaults to true. The field, which is required for the Single Data Return, indicates whether you expect the student to complete their qualification in the current academic year.
- First Year – This field is used by Take2 in some statistical reports. Leave a tick in the field only if the student in their first year of study.
- Fees Paid – The default value is set on the Site Details form.
- Class – A student’s enrolment event can be attached to a class.
- Tutor – A student’s enrolment event and course enrolments can be assigned to a tutor.
- ME Fee – The Maxima Exempt Fee for the enrolment event. A definition of this value is available in the MoE SDR Manual.
- Enrolled By – Enter your name or initials to record who processed the enrolment. Click the question mark symbol to fill the field with the value that was last used.
- Log Number – This is a unique number assigned by Take2 to each enrolment process. You may like to write the number on a student’s paper enrolment form for audit purposes. The enrolment log can be used to reverse and modify existing enrolments.

Dates

Enrolment dates are very important because they affect funding mechanisms and other processes, such as recording course completion codes.

When you process an enrolment the various parts of the enrolment are assigned dates. What dates are assigned and their relevance is described here.

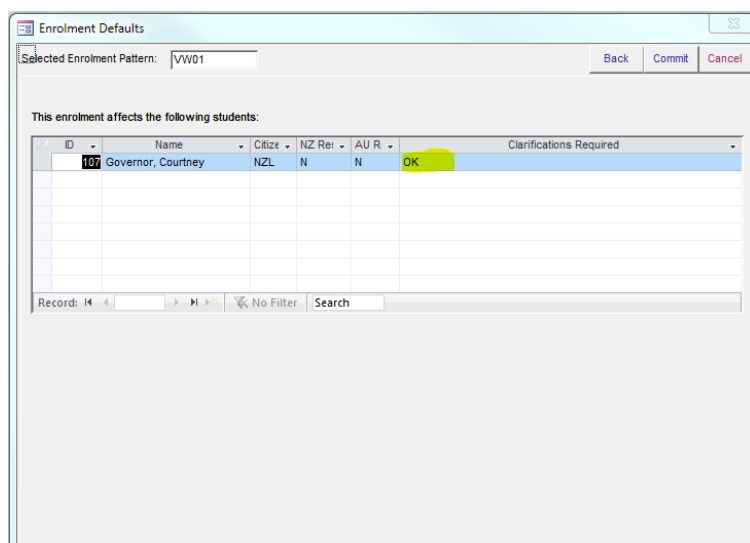
- Qualification Start and Finish Dates
 - If you click Use Qualification Dates the start and finish dates of the offered qualification into which the student is being enrolled will be filled in automatically from the values entered on the Curriculum form.
 - Alternatively clicking Use Previous Enrolment Dates will look up the dates used last time you did an enrolment. Otherwise you can manually enter the dates in the Start Date and Finish Date fields.
 - When the enrolment is processed the start date value is used as the qualification start date.

- Enrolment Event Start and Finish Dates
 - The start and finish dates obtained or entered as described above are also used as the start and finish dates for the enrolment event.
- Course Enrolment Start and Finish Dates
 - If the Use Enrolment Event Dates option is selected the same start and finish dates are assigned to course enrolments.
 - If the Set Offered Course Dates option is selected a new datasheet appears on the Enrolment Defaults form.
 - The datasheet displays all offered courses being used for the enrolment.
 - The start and finish dates assigned to the offered courses on the Curriculum form (if any) are displayed but you can, if you wish, overwrite these dates.
- Note – if you are enrolling a student into more than one qualification you must use the same date option for all qualifications.
- Component Enrolment Start Date – The enrolment event start date is assigned to the component enrolment.
- Enrolment Date Rules – Take2 applies a number of rules about enrolment dates:
 - The start date must be the same as or before the finish date.
 - If the start date year is not the previous, current or next year a warning will be issued.
 - If the finish date is not the current or next year a warning will be issued.

Continuing the Enrolment

Once you have entered all required enrolment attribute and date items click Continue and a new view is displayed for Access edition users. This is the Clarification view and most of the time you will find that in fact no clarification is required so it looks the screenshot below if a single student is to be enrolled. If there are multiple students there will be multiple records in the data sheet and each record will have its own value in the Clarification Required field.

For SQL Server edition users the Clarification view is not displayed unless clarifications are in fact required. In which the enrolment is immediately processed.



If all records are “OK” you can immediately click Commit to complete the enrolment process. If you are enrolling a single student it will only take a few seconds and you will be returned to either the Students form (if this is where you started) or the Enrolments menu.

The process will take longer for a group of students and when it is complete you will be returned to the Enrolments menu.

Note – if you try to commit an enrolment for student(s) who does not have a residency value stored on the Students form the enrolment process will terminate and a report showing details of the student(s) will be printed. Also, if you try to enrol a student who has never been enrolled before, and you have not selected a qualification in your curriculum selection, Take2 will prevent the enrolment proceeding.