



Tertiary Education Commission
Te Amorangi Mātauranga Matua

ERS User Guide

**for foundation-focused Training
Opportunities and Youth Guarantee
programmes**

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The Tertiary Education Commission
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Introduction

About this user guide

This user guide is for users of the Electronic Receipting System (ERS). This version is for foundation-focused Training Opportunities and Youth Guarantee programmes.

The user guide is downloadable from www.tec.govt.nz but is best read online if you want to access the hyperlinks. It is also available from the ERS online help (see [Help](#) for instructions on accessing it).

Getting help

Use the following table to decide where to get help:

STEP	COMMENTS								
1. Check the user guide	The information you need is probably available in this user guide.								
2. If you still need help	If you can't find what you need in the user guide, then contact one of the following: <table border="1"><thead><tr><th>IF THE PROBLEM RELATES TO ...</th><th>THEN ...</th></tr></thead><tbody><tr><td>Queries concerning enrolment issues, eligibility criteria, funding rules etc</td><td>Refer to the Foundation Focused Training Opportunities Handbook available from www.tec.govt.nz. Or contact the TEC Service Centre on 0800 601 301 or servicecentre@tec.govt.nz</td></tr><tr><td>Technical problems accessing ERS</td><td>Contact the TEC Service Centre 0800 601 301 or servicecentre@tec.govt.nz.</td></tr><tr><td>Technical problems with "ESAA login" or the "National Student Index"</td><td>Contact the Ministry of Education Sector Service Desk at 0800 422 599 or sector.servicedesk@minedu.govt.nz</td></tr></tbody></table>	IF THE PROBLEM RELATES TO ...	THEN ...	Queries concerning enrolment issues, eligibility criteria, funding rules etc	Refer to the Foundation Focused Training Opportunities Handbook available from www.tec.govt.nz . Or contact the TEC Service Centre on 0800 601 301 or servicecentre@tec.govt.nz	Technical problems accessing ERS	Contact the TEC Service Centre 0800 601 301 or servicecentre@tec.govt.nz .	Technical problems with "ESAA login" or the "National Student Index"	Contact the Ministry of Education Sector Service Desk at 0800 422 599 or sector.servicedesk@minedu.govt.nz
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Getting started

Obtaining username and password

You can't access ERS until you have approved login to ESAA (Education Sector Authentication and Authorisation). ESAA is an identity management service that controls access to multiple education sector web-based systems by a single login (including ERS).

If you have these approved roles, your ESAA user id and password also provides access to the National Student Index (NSI), Tertiary Providers Extranet, and STEO.

If you need help getting set up in ESAA, refer ESAA downloads from www.steo.govt.nz, or contact the Ministry of Education Sector Service Desk (0800 422 599 or sector.servicedesk@minedu.govt.nz).

Logging in

Once you have an ESAA username and password, you can log into ERS. The [Login](#) screen describes how to do this.

Notes:

- You will be automatically logged off your ERS session if it has been inactive for 30 minutes.
- Each Tertiary Education Organisation (TEO) using ERS is responsible for advising the Ministry of Education Sector Service Desk sector.servicedesk@minedu.govt.nz when a staff member leaves their employment, or moves from the ERS role.

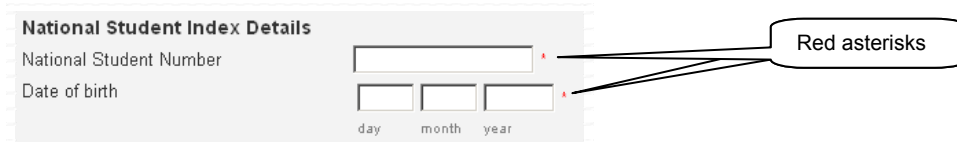
Logging out

Remember to [logout](#) when you've finished.

General techniques

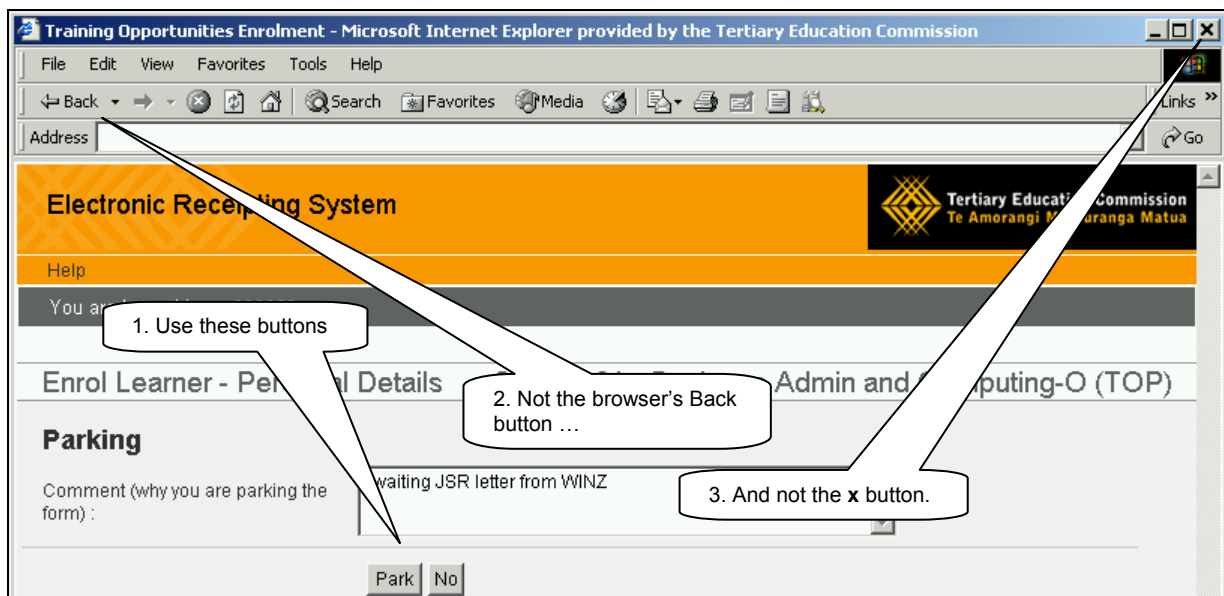
Mandatory fields

Mandatory fields are marked with a red asterisk. For example, in the screen below, both the “National Student Number” and “Date of Birth” fields are mandatory.



Use the ERS buttons

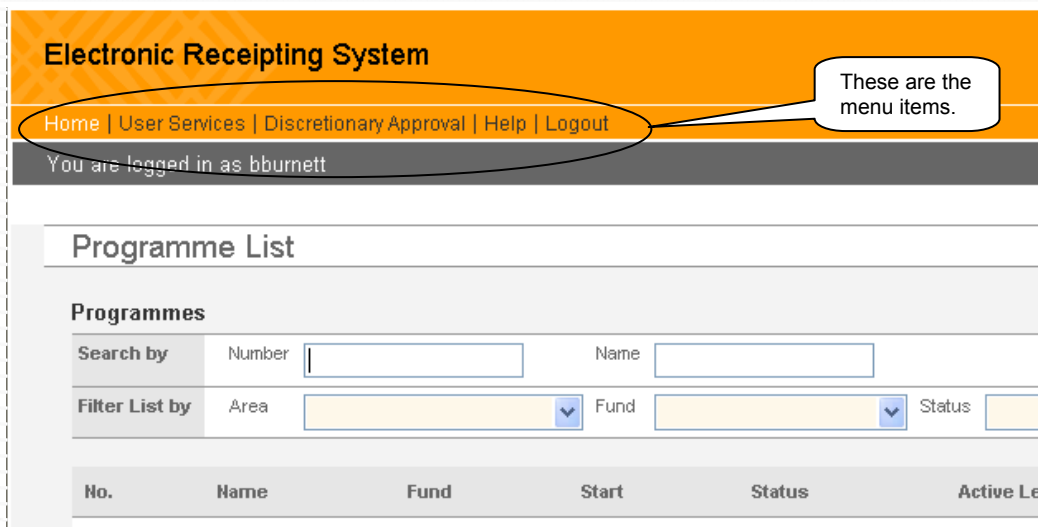
When you use ERS (or any other web-based system), it is essential to use ERS’s buttons and not the browser buttons, as shown here:



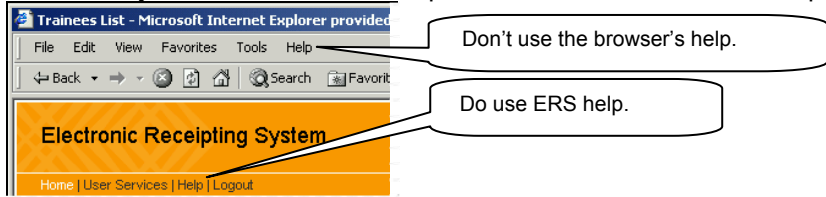
IMPORTANT: If you use the browser to navigate or close screens, you could lose everything you’ve entered.

Menus

Menu items appear across the top of most of the screens.



This table describes those menu items:

MENU ITEM	COMMENTS
Home	Clicking the Home menu returns you to the Programmes List screen.
User services	<p>Click the User Services menu to change any of the following:</p> <ul style="list-style-type: none"> ▫ Your password. ▫ Your challenge response questions and answers. ▫ Your ESAA profile (see note below). ▫ Change organisation (only appears if you have authorisation to act on behalf of more than one organisation). <p>NOTE: Your ESAA profile contains your personal information, such as preferred name, telephone number(s), email address, etc.</p>
Help	<p>Clicking the Help menu displays a page from which you can download this user guide.</p> <p>Make sure you choose the ERS Help menu and not the browser Help:</p> 
Log out	<p>Clicking the Logout menu logs you out of ERS. See Logout screen for more detail.</p> <p>IMPORTANT: Always logout when you've finished, so that others cannot gain unauthorised access to ERS.</p>

Using ERS

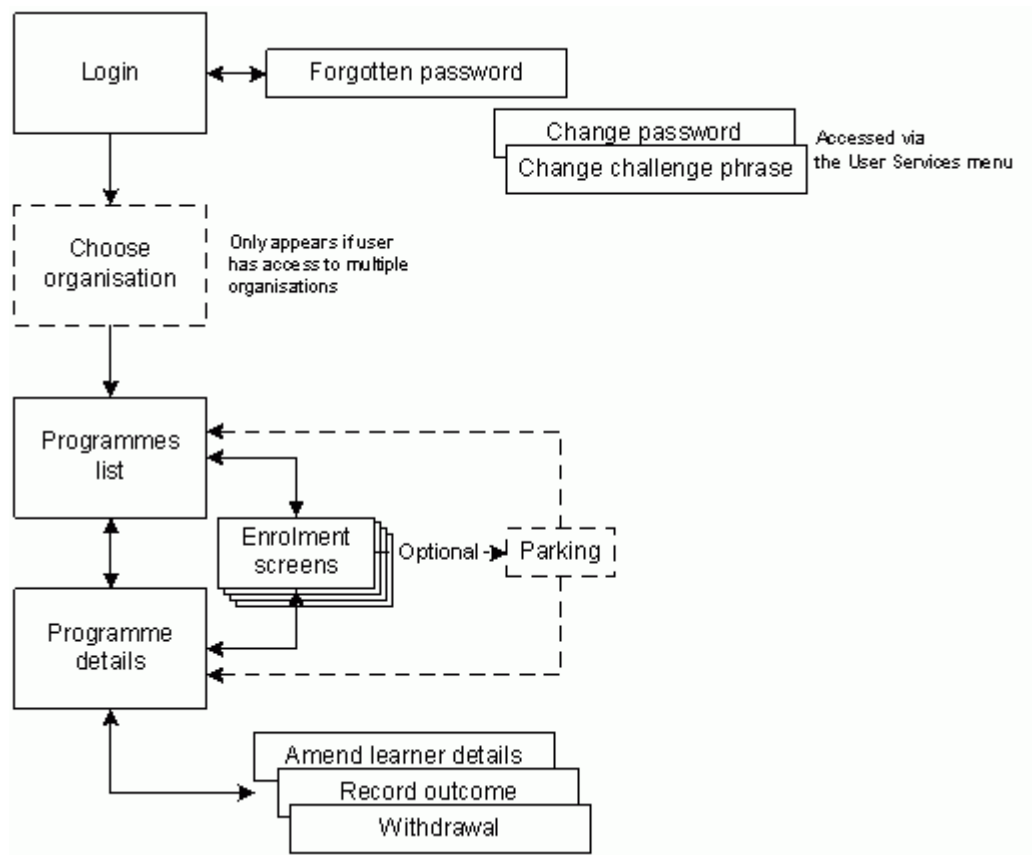
Once you're logged in, you can start using ERS. In this document, the screens are described in the following groups:

TYPE OF SCREEN	PURPOSE
Programme screens	<p>There are two screens dealing with programmes:</p> <ul style="list-style-type: none">▫ The Programmes List screen lists all the programmes the TEO is authorised to provide.▫ The Programme Details screen lists the learners enrolled in a particular programme. <p>These are the main screens you will use, and you will keep returning to them.</p>
Enrolment screens	<p>You will use this series of screens when enrolling a learner on a programme. They are accessed via a programme screen.</p>
Other action screens	<p>These are all the other action screens (amend learner details, etc). They are also accessed via a programme screen.</p>
Security screens	<p>This group of screens help protect ERS from unauthorised use. They control logging in, changing your password, etc.</p>

An [overview chart](#) is available on the next page, showing how all the screens fit together.

Screens: Overview chart

This shows how the various screens link together:



Screens: Programmes

This section describes the two screens that list programmes and their details. They are the main screens you will use.

Programmes List screen

Use the Programmes List screen to display:

- All the programmes the TEO is authorised to provide.
- All “parked” enrolments. (You can park an enrolment partway through data entry if you need to clarify data or obtain missing data before continuing. Everything you have entered so far will be saved.)

The Programmes List screen first appears on logging in (see [Login screen](#)). In many situations, you will return to it after making changes via the [Other action](#) screens.

To use the screen, either:



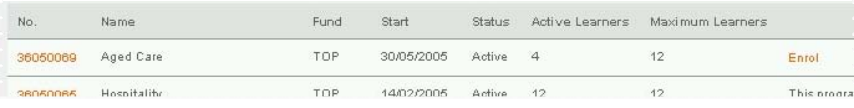
- Search (by entering the programme number or name or part of name; or
- Filter the list (to reduce what’s displayed), by selecting filters from the drop-down lists.

The screenshot shows the 'Electronic Receiving System' interface. At the top, it says 'Tertiary Education Commission Te Amorangi Mātauranga Matua'. Below the header, there are navigation links: 'Home | User Services | Help | Logout'. The user is logged in as '9259'. The main section is titled 'Programme List' and shows a table of programmes. The table has columns for 'No.', 'Name', 'Fund', 'Start', 'Status', 'Active', and 'Enrol'. The programmes listed are: 36050069 (Aged Care), 36050065 (Hospitality), 36050068 (PTP Training Opportunities), 36050066 (Retail Sales), and 36050067 (Transport and Storage). Below the table is a section for 'Parked Enrolments' with columns for 'NSN', 'First Name', 'Last Name', 'Programme Number', 'Comment', 'Date Parked', and 'User Id'. A callout box points to the search and filter area, stating: 'Always check that you have the correct TEO.' and 'Use this area to SEARCH for a programme, or to FILTER the display to restrict the list to programmes meeting certain criteria.' Another callout box points to the table, stating: 'This area lists all programmes the TEO is approved for. You can make it shorter by searching or filtering.' A third callout box points to the 'Enrol' button in the table, stating: 'This area lists any parked enrolments.' A note at the bottom states: 'NOTE: You can display a programme's details by clicking its number.'

No.	Name	Fund	Start	Status	Active	Enrol
36050069	Aged Care	TOP	30/05/2005	Active	4	12
36050065	Hospitality	TOP	14/02/2005	Active	12	12
36050068	PTP Training Opportunities	TOP	11/04/2005	Active	23	26
36050066	Retail Sales	TOP	07/03/2005	Active	9	11
36050067	Transport and Storage	TOP	07/02/2005	Active	5	10

NSN	First Name	Last Name	Programme Number	Comment	Date Parked	User Id
1223334444	Julius	Caesar	36050067			9259

Clicking a programme’s number (on the left) displays the [Programme Details](#) screen, which displays detailed information about the programme you’ve selected.

FIELD, BUTTON, LINK	COMMENTS
<p>“SEARCH BY” FIELDS</p> 	
Number	Programme number.
Name	Programme name (restricted to 30 characters).
Search button	<p>Click this to execute the search. The list of programmes (see below) changes to reflect the search criteria.</p> <p>NOTE: If there is only one programme in the search result, ERS takes you directly to the Programme Details screen.</p>
Reset button	Click this to clear the search fields.
<p>“FILTER LIST BY” FIELDS</p> 	
Area	Northland, Bay of Plenty, etc.
Fund	Training Opportunities, Youth Guarantee.
Status	Active, Pending, Completed.
Filter button	Click this to execute the filter. The programmes list changes to reflect the filter criteria.
Reset button	Click this to clear the filter fields.
<p>LIST OF PROGRAMMES</p> 	
<p>PROGRAMMES LIST</p>	
No. Name Fund ...etc	<p>List of all the programmes you are approved for. You can make it shorter by searching or filtering.</p> <p>Note:</p> <ul style="list-style-type: none"> The programme number (in the “No.” column) is also a link. Click it to see detailed information about the programme. The Programme Details screen appears. If “Enrol” is visible at the end of a row, it can be clicked to enrol a new learner in that programme. The Personal Details screen appears. <p>NOTE: Remember to take parked enrolments into account when deciding whether to accept additional enrolments.</p>
<p>PARKED ENROLMENTS (AT BOTTOM OF SCREEN)</p>	
NSN First name Last name ...etc	<p>List of all parked enrolments.</p> <p>Note:</p> <ul style="list-style-type: none"> If “Select” is visible at the end of a row, it can be clicked to restart enrolment of the new learner. The Personal Details screen appears. If “Delete” is visible at the end of a row, it can be clicked to delete a parked enrolment started in error. You will be asked to confirm the deletion. If you delete the enrolment, all its data will be lost.

Programme Details screen

Use the Programme Details screen to display detailed information about a particular programme, including:

- Fund, start/end dates, status and payment cycle.
- Recess periods (if applicable).
- Number of learners currently enrolled in the programme, and the maximum permitted.
- List of learners.

Starting at the Programme Details screen, you can:

- Enrol a new learner.
- Amend a learner's details.
- Delete an enrolment if the placement on the programme is the same day as the learner was enrolled.
- Withdraw a learner from the programme.
- Record the outcome for a learner (at the 2 month post-withdrawal mark).

The Programme Details screen appears after clicking a programme's [number](#) in the Programmes List screen:

Electronic Receiving System Tertiary Education Commission
Te Amorangi Mātauranga Matua

Home | User Services | Help | Logout

You are logged in as ??9259

Programme Details 12345678 - ABC Company Ltd

Fund	Programme Start Date	Programme End Date	Status	Payment Cycle
TOP	10/01/2005	16/12/2005	Active	A



Recesses

Start Date	End Date
04/07/2005	08/07/2005

Learners

Number of learners currently enrolled is 11 out of a maximum of 14 [Enrol](#)

NSN	First Name	Last Name	Start Date	End Date	Travel Amount	Outcome Code	
0000735259	Joanne	Andrews	01/06/2005		\$4.54		Amend Delete Placement
0106425804	Mark	Antony	23/02/2005	29/03/2005	\$1.30	OFT	Amend
0104232577	Eleanor	Aquitaine	28/04/2005		\$8.00		Amend Withdraw
0104232577	Eleanor	Aquitaine	07/02/2005	20/04/2005		TOP	Amend
1223334444	Markus	Aurelius	07/03/2005	12/04/2005			Amend Record Outcome

FIELD, BUTTON, LINK	COMMENTS
SUMMARY DETAILS (AT TOP)	
Fund Programme start date ...etc	High-level details about the programme.
RECESSES	
Start date End date	List of recess periods (if applicable).
LEARNERS	
Number of learners currently enrolled	 <p>Number of learners currently enrolled in the programme, and the maximum permitted. NOTE: If “Enrol” is visible on the right hand side, it can be clicked to enrol a new learner in the programme. The Personal Details screen appears.</p>
LIST OF LEARNERS	
NSN First name Last name ...etc	
This is a list of all people enrolled in this programme. Note that one or more of the following links may appear on the right hand side of a row:	
LINK	COMMENTS
Amend	Click to amend a learner’s details. The Amend Learner screen appears.
Delete placement	Click to delete a learner enrolled in error. The Delete Placement screen appears. Notes: <ul style="list-style-type: none"> • This link appears only if the programme has not yet started OR the learner was enrolled today. Otherwise, you are given the option of “withdrawing”. • Learners deleted from a programme, no longer show as an active enrolment. TEO funding and learner travel relating to this learner’s placement is cancelled and an outcome is not required.
Record outcome	Click to add an outcome for the learner. The Record Outcome screen appears. Notes: <ul style="list-style-type: none"> • Cannot be done until two months after withdrawal. • If recording the outcome is overdue by 30 days, ERS will automatically set the outcome to Unknown. Only TEC will be able to change the outcome after it has been submitted.
Withdraw	Click if the learner is withdrawing from a programme before the programme end date. The Withdraw Learner screen appears. Notes: <ul style="list-style-type: none"> • If you are withdrawing a learner as the result of a placement error, send a completed “Placement In Error” form to the TEC Service Centre. The TEC will use the information you provide to help identify any payment adjustments that may be needed. The form is available on www.tec.govt.nz. • The option of “withdrawing” a learner is available only if the programme has started AND the learner was enrolled before today. Otherwise, you are given the option of “deleting”.

Screens: Enrolment

This section describes the enrolment screens. These are the series of screens that appear when you enrol a learner in a programme.

Notes:

- Each screen is described in order of appearance.
- The screens shown relate to the Youth Guarantee programme. The screens vary slightly for other programmes.

Personal Details screen

Use the Personal Details screen to:

- download the learner's details from the National Student Index database;
- check or update the learner's contact details if the learner has an existing record; or
- enter the learner's contact details, if learner is new.

Display it by:

- clicking an [Enrol](#) or [Select](#) link in the Programmes List screen; or
- clicking an [Enrol](#) link in the Programme Details screen.

The screenshot shows the 'Training Opportunities Enrolment - Personal Details' screen. The header includes the Tertiary Education Commission logo and navigation links. The main content area is divided into sections for 'National Student Index Details' and 'Address'. The 'National Student Index Details' section contains fields for National Student Number (0123456789), Date of birth (1/01/1991), Name (Fred Dagg), and Gender (female). The 'Address' section contains fields for Street (39 b Grenada Street), Suburb (Arataki), Town/city (Mt Maunganui), Postal Code, Contact phone number (07 5744299), and Other phone number (027 3687877). A 'Lookup NSN' button is visible. At the bottom are 'Next', 'Park', and 'Cancel' buttons. Five numbered callouts provide instructions: 1. Enter the student's National Student Number and their date of birth. 2. Click the Lookup NSN button. 3. The remaining fields update automatically. 4. Enter contact details for new learners, or update the learner's contact details, if old details automatically populate. 5. Click the Next button.

Electronic Receiving System

Home | User Services | Help | Logout

You are logged in as ??9646

Skill Enhancement Enrolment - Personal Details Joe Blows 28060068-Aquaculture

National Student Index Details

National Student Number: 1112223330

Date of birth: 01 / 04 / 1982

Name: Joe Blows, Joseph Blows

Gender: male

Address

Street: 1 Penny Lane

Suburb: Karori

Town/city: Gisborne

Contact phone number: (06) 1112223

Other phone number: ()

Buttons: Next, Park, Cancel

1. Enter the student's National Student Number and their date of birth.
2. Click the Lookup NSN button.
3. The remaining fields update automatically.
4. Enter contact details for new learners, or update the learner's contact details, if old details automatically populate.
5. Click the Next button.

FIELD, BUTTON, LINK	COMMENTS
National Student Number Date of birth	You can't enrol a learner without an "active" NSN and matching date of birth.
Name Gender	Automatically filled when you click the Lookup NSN button.
Lookup NSN button	Click this after entering the NSN and date of birth. The remaining fields will automatically fill. NSN status must be active for a learner to be enrolled. <ul style="list-style-type: none"> □ If the learner doesn't have an active NSN, it will be necessary to register them on the NSI via https://nsi.education.govt.nz. (See Obtaining username and password if you don't.) □ If the learner has registered in more than one programme using different names (for example, "Chris Henare" in one, and "Chris Tu Henare" in another), all names used will be listed. <p>NOTE: In exceptional circumstances a learner can have a duplicate NSN record under different names. Please check the NSI, or call the TEC Service Centre for assistance when this applies.</p>
Clear NSN button	Click this to clear the Personal Details fields (name, etc).
Street Suburb Town/City Postal code Contact phone number Other phone number	Automatically filled if the learner has previously been enrolled on another programme. Amend, as appropriate, or enter details if the learner doesn't have prior records.
Next button	Click this to move to the next screen.

FIELD, BUTTON, LINK	COMMENTS
Park button	Click this if you need to “park” the enrolment while you clarify details or obtain missing information. The Parking screen appears. NOTE: Parking an enrolment saves data from all four of the enrolment screens, not just the one you are looking at.
Cancel button	Click this to cancel the enrolment. Everything you’ve entered will be lost.

Eligibility Details screen (Training Opportunities)

This section deals with the Eligibility Details screen for Training Opportunities.
The screen for Youth Guarantee is different (see the next section).

Use the Eligibility Details screen to:

- enter data used in determining eligibility;
- obtain an eligibility code.

The screen appears:

- if you click the [Next button](#) in the Personal Details screen; and
- the enrolment is for Training Opportunities.

Refer to the Foundation Focused Training Opportunities Handbook for a description of eligibility criteria (available on www.tec.govt.nz).

Electronic Receiving System Tertiary Education Commission
Te Amorangi Mātauranga Mātua

Home | User Services | Performance Dashboard | Discretionary Approval | Help | Logout

You are logged in as mgoodson Elizabeth Jane Hinton 22110031-BOP TFW Multi-TOPS

Training Opportunities Enrolment - Eligibility Details

Learner start date / / *

Eligibility Criteria

Age (as at today) 37

Date left school / /

Last secondary school

Education History

Learner referred by *

Total number of weeks registered with work and income

JSR Number *

SWN Number *

Job Seeker Status

Benefit Type

Work and Income Youth Client

Learner attendance on Youth Training programme within last 3 months

Learner attendance on Training Opportunities programme within last 6 months

Refugee status granted

MoE Certificate of Exemption date / /

Number of credits in Literacy

Number of credits in Mathematics

Eligibility Code **Need to Check Details**

ELX Number

1. Complete all relevant fields according to the applicable eligibility criteria.
2. Then click the "Check details" button ...
3. ... which causes an eligibility code to appear here (provided you've entered all required information).
4. Finally, click the Next button.

FIELD, BUTTON, LINK	COMMENTS
Learner start date	Date the learner will start.
Age (as at today)	The learner's age as at today.
Date left school	The learner's last day at school. Note if only the year is known, you may use a proxy date and month, providing the year is correct.
Last secondary school	Select from the drop-down list.
Education history	Select learner's highest educational achievement from the drop-down list.
Learner referred by	Select from the drop-down list.
Total number of weeks registered with Work and Income	Weeks registered as a job seeker. Note: <ul style="list-style-type: none"> ▫ Obtain the total number of weeks from Work and Income's "Client Basic Details Report". ▫ Ignore part weeks.
Enter either: JSR number ...or: SWN number	JSR number is called "Client No." on the Work and Income "Client Basic Details Report" and is often referred to as "SOLO" number by Work and Income employees. SWN number is the learner's Social Welfare number.
Job Seeker status	Enter from the Client Basic Details Report.
Benefit type	Select from the drop-down list
Work and Income youth client	Select this if the learner is a Work and Income youth client.
Learner attendance on Youth Guarantee programme within last 3 months	Select this if the learner attended a Youth Guarantee programme within the last three months.
Learner attendance on Training Opportunities programme within last 6 months	Select this if the learner attended a Training Opportunities programme within the last six months.
Refugee Status granted	Select this if the learner has been granted refugee status.
MoE certificate of exemption date	Date "effective from" on the learner's MoE Certificate of Exemption.
ELX number	The reference number on the exemption approval letter from the MoE or the MoE Certificate of Exemption.
Number of credits in Literacy	The learner's credits in approved literacy courses.
Number of credits in Mathematics	The learner's credits in approved mathematics courses.
Eligibility code	See Check Details button, below.
Check Details button	Click this to obtain an eligibility code. Note the following: <ul style="list-style-type: none"> ▫ The eligibility code will replace the red warning "Need to check details" (to the left of the "Check details" button). ▫ You won't be able to change anything (but see Re-Enter Details button, below).
Re-Enter Details button	Click this to clear the eligibility code and start again. The code will be cleared and you will be able to change what you've entered.
Back button	Click this to return to the Personal Details screen. (You won't lose what you've entered.)
Next button	Click this to move to the next screen.
Park button	Click this if you need to "park" the enrolment while you clarify details or obtain missing information. The Parking screen appears. NOTE: Parking an enrolment saves data from all four of the enrolment screens, not just the one you are looking at.
Cancel button	Click this to cancel the enrolment. Everything you've entered will be lost.

Eligibility Details screen (Youth Guarantee)

This section deals with the Eligibility Details screen for Youth Guarantee. The screen for Training Opportunities is different (see the previous section).

Use the Eligibility Details screen to:

- enter data used in determining eligibility;
- obtain an eligibility code.

The screen appears:

- if you click the [Next button](#) in the Personal Details screen; and
- the enrolment is for Youth Guarantee.

Refer to the Foundation Focused Training Opportunities Handbook for a description of eligibility criteria (available on www.tec.govt.nz).

Electronic Receipting System

Home | User Services | Performance Dashboard | Discretionary Approval | Help | Logout

You are logged in as mgoodson

Youth Enrolment - Eligibility Details

Learner start date: 17 / 02 / 2012

Eligibility Criteria

Age (as at today): 17

Date left school: 17 / 01 / 2012

Last secondary school: [Drop-down menu]

Education History: Total of all credits earned less than 12

MoE Certificate of Exemption date: [Day] / [Month] / [Year]

ELX Number: [Field]

Number of credits in Literacy: [Field]

Number of credits in Mathematics: [Field]

TEC Discretionary Approval code: [Field]

Eligibility Code: YG

Buttons: Back, Next, Park, Cancel, Check Details, Re-Enter Details

1. Complete all relevant fields according to the applicable eligibility criteria.
2. Then click the Check Details button ...
3. ... which causes an eligibility code to appear here (provided you've entered all required information).
4. Finally, click the Next button.

FIELD, BUTTON, LINK	COMMENTS
Learner start date	Date the learner will start.
Age (as at today)	The learner's age as at today.
Date left school	The learner's last day at school. Note if only the year is known, you may use a proxy date and month, providing the year is correct.
Last secondary school	Select from the drop-down list.
Education history	Select the learner's highest educational achievement from the drop-down list.
MoE certificate of exemption date	Date "effective from" on the learner's MoE Certificate of Exemption.

FIELD, BUTTON, LINK	COMMENTS
ELX number	The reference number on the exemption approval letter from the MoE or the MoE Certificate of Exemption.
Number of credits in Literacy	The learner's credits in approved literacy courses.
Number of credits in Mathematics	The learner's credits in approved mathematics courses.
Eligibility code	See Check Details button, below.
Check Details button	<p>Click this to obtain an eligibility code. Note the following:</p> <ul style="list-style-type: none"> ▫ The eligibility code will replace the red warning "Need to check details" (to the left of the "Check details" button). ▫ You won't be able to change anything (but see Re-Enter Details button, below).
Re-Enter Details button	Click this to clear the eligibility code and start again. The code will be cleared and you will be able to change what you've entered.
Back button	Click this to return to the Personal Details screen. (You won't lose what you've entered.)
Next button	Click this to move to the next screen.
Park button	<p>Click this if you need to "park" the enrolment while you clarify details or obtain missing information. The Parking screen appears.</p> <p>NOTE: Parking an enrolment saves data from all four of the enrolment screens, not just the one you are looking at.</p>
Cancel button	Click this to cancel the enrolment. Everything you've entered will be lost.

Statistical Information screen

Use the Statistical Information screen to enter statistical information such as ethnic group, employment history, and so on.

The screen appears after clicking the Next button in one the two Eligibility Details screens:

- Next button for [Training Opportunities](#).
- Next button for [Youth Guarantee](#).

The screenshot shows the 'Electronic Receiving System' interface. The page title is 'Training Opportunities Enrolment - Statistical Information'. The user is logged in as 'mgoodson'. The form contains the following fields and callouts:

- Ethnic group:** A multi-select dropdown menu with options: Don't Know, Southeast Asian nfd, European nfd, Pacific Peoples nfd, Refused to Answer, Asian nfd, and N Z European/ Pakeha. Callout 1: '1. Select one or more ethnic groups.'
- Main tribal group:** A single-select dropdown menu. Callout 2: '2. If your selections include New Zealand Māori, also specify a main tribal group... plus any other affiliations.'
- Other tribal affiliations:** A multi-select dropdown menu with options: Aotea, Dont Know name of Iwi, Hapu Affiliated to More Than One Iwi, Hauraki (Coromandel) Region, not further defined, Hauraki / Pare Hauraki, Horouta, and Kati Mamoe. Callout 3: '3. Also complete these fields (regardless of the ethnic group selected).'
- General Information:**
 - Employment history:** A single-select dropdown menu. Callout 4: '4. Then click the Finish button.'
 - Prior activity:** A single-select dropdown menu.
 - Literacy needs:** A checkbox.

At the bottom of the form are buttons for 'Back', 'Finish', 'Park', and 'Cancel'.

FIELD, BUTTON, LINK	COMMENTS
Ethnic group	Select one or more by holding down the Ctrl key.
Main tribal group	Select from the drop-down list (but only if your selections included New Zealand Māori).
Other tribal affiliations	Select any other tribal affiliations. To select multiples: <ul style="list-style-type: none"> ▫ select the first one (For example: Ngāi Tai); ▫ press the Ctrl key and keep holding it down while you click your second selection (For example: Ngāpuhi); ▫ keep doing this until you have selected all the required affiliations. <p>WARNING: If you forget to hold the Ctrl key down, you will have to start again.</p>
Employment history	Select from the drop-down list.
Prior activity	Select from the drop-down list.
Literacy needs	Click this if the learner has literacy needs.

FIELD, BUTTON, LINK	COMMENTS
Finish button	Click the button to move to the next screen.
Back button	Click this to return to the previous screen. (You won't lose what you've entered.)
Park button	<p>Click this if you need to “park” the enrolment while you clarify details or obtain missing information. The Parking screen appears.</p> <p>NOTE: Parking an enrolment saves data from all four of the enrolment screens, not just the one you are looking at.</p>
Cancel button	Click this to cancel the enrolment. Everything you've entered will be lost.

Pre-confirmation Page

The Pre-confirmation Page summarises everything you've entered in the previous enrolment screens. Use it to check that everything is correct before submitting the enrolment.

The screen appears after clicking the [Finish](#) button in the Statistical Information screen.

The screenshot shows the 'Electronic Receipting System' interface. At the top, there is a navigation bar with links for Home, User Services, Performance Dashboard, Discretionary Approval, Help, and Logout. Below this, it indicates the user is logged in as 'mgoodson'. The main heading is 'Training Opportunities Enrolment - Pre-confirmation Page'.

The form is divided into several sections:

- Personal and Contact Information:** Includes fields for Eligibility Code (WINZREF) and Ethnicity (Ethnic Groups: Don't Know).
- General Information:** Includes Employment History (Worked Full Time for 1 year or more), Prior Activity (At School), and Literacy Needs (No).
- Provider Declaration:** A section where the user confirms the accuracy of the information. It contains two numbered points:
 - I have completed and signed the declaration required by the learner's enrolment form.
 - The information I am submitting is complete and is exactly as it appears on the learner's enrolment form and supporting documentation, except for the correction of any obvious typographical errors (which have been noted on the enrolment form).
 Below the points is a checkbox labeled 'Please declare the above to be true: *'.

At the bottom of the form, it shows 'Completed by: mgoodson' and 'Completed on: 09/02/2012'. There are four buttons: Back, Submit, Park, and Cancel.

Three callout boxes provide instructions:

1. Check all your data entry against the original enrolment form.
2. If everything is correct, complete the declaration by clicking (putting a tick in) this box.
3. Once you are certain that all details are correct, click the Submit button to send the enrolment to TEC.

FIELD, BUTTON, LINK	COMMENTS
Please declare the above to be true	Select (tick) this field only if all the data entry is correct.
Back button	Click this to return to the previous screen. (You won't lose what you've entered.)
Submit button	Click this to submit the enrolment. The Confirmation page appears.
Park button	Click this if you need to "park" the enrolment while you clarify details or obtain missing information. The Parking screen appears. NOTE: Parking an enrolment saves data from all four of the enrolment screens, not just the one you are looking at.
Cancel button	Click this to cancel the enrolment. Everything you've entered will be lost.

Confirmation page

The Confirmation screen appears after clicking the [Submit](#) button in the Pre-confirmation Page. Use the screen to:

- print a copy of the enrolment details for audit purposes; then
- close the enrolment (after which you have the option of doing another enrolment in the same programme).

Electronic Receipting System Tertiary Education Commission
Te Amorangi Mātauranga Matua

Home | User Services | Performance Dashboard | Discretionary Approval | Help | Logout

You are logged in as mgoodson

Confirmation page Chris Henare

Please ensure that this page is printed and is retained on the learners file.

Close Enrol Another Learner On Same Programme

Personal and Contact Information

NSN 0123456789
Name Chris Henare
Date of birth 01/01/1995
Gender
Address 1 Nov... Place
Auckland
Contact phone number (05) 5555555

Provider Declaration
I confirm that:

1. I have completed and signed the declarations required by the learner's enr...
2. The information I am submitting is complete and is exactly as it appears o...
enrolment form and supporting documentation, except for the correction of
typographical errors (which have been noted on the enrolment form).

Please declare the above to be true: *

Completed by: mgoodson
Completed on: 17/02/2012

Close Enrol Another Learner On Same Programme

1. Print the screen (see the next section, "Printout for audit purposes", for details).

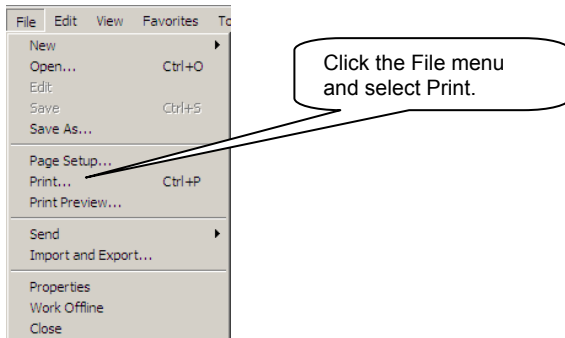
2. Then click Close to return to the Programme List screen...
...or...
Click "Enrol another learner on the same programme" to return to the Programme Details screen, where you can enrol another learner in the same programme.

FIELD, BUTTON, LINK	COMMENTS
Close button	Click this to return to the Programme List screen. IMPORTANT: Make sure you print the screen first (see Printout for audit purposes below for details).
Enrol Another Learner On The Same Programme button	Click this to return to the Programme Details screen, where you can enrol another learner in the same programme. IMPORTANT: Make sure you print the screen first (see Printout for audit purposes below for details).

Printout for audit purposes

Printing is a crucial step and mandatory for auditing purposes. Keep the printout of the Confirmation page, attach it to the enrolment form, and retain on the learners' files.

This is how you print the screen:



NOTE: The File menu will look slightly different if you're not using Microsoft Internet Explorer.

Screens: Other actions

This section describes the screens you will use to take other actions (amend a learner's details, etc). The screens are listed in alphabetical order.

Amend Learner screen

Use the Amend Learner screen to modify learner details (which were first entered when enrolling the learner into this particular programme). The screen appears after clicking the [Amend](#) link in the Programme Details screen.

Electronic Receiving System

Home | User Services | Performance Dashboard | Discretionary Approval | Help | Logout

You are logged in as mgoodson

Amend Learner

Personal Details
 NSN: 0123456789
 Name: Chris Henare

Address
 Street: 1 Nowhere Place *
 Suburb:
 Town/city: Auckland *
 Postal Code:
 Contact phone number: (05) 5555555 *
 Other phone number: ()

Provider Declaration
 I confirm that:
 1. I have completed and signed the declarations required for the learner's enrolment form.
 2. The information I am submitting is complete and is exactly as it appears on the learner's enrolment form and supporting documentation, except for the correction of any obvious typographical errors (which have been noted on the enrolment form).

Please declare the above to be true: *

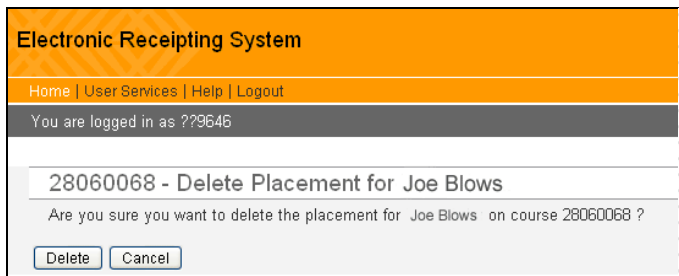
Completed by: mgoodson
 Completed on: Fri Feb 17 15:46:19 NZDT 2012

Save Amendment Cancel

FIELD, BUTTON, LINK	COMMENTS
NSN Name	Use this information to confirm you've selected the correct learner.
Street Suburb ...etc	Amend the learner's address and contact details, as appropriate.
Please declare the above to be true	Select this field only if all the data entry is correct.
Save Amendment button	Click this to save the changes.
Cancel button	Click this to cancel the amendment. Everything you've entered will be lost.

Delete Placement screen

The Delete Placement screen is used to confirm a deletion. The screen appears after clicking the [Delete Placement](#) link in the Programme Details screen:



The screenshot shows a web interface for the 'Electronic Receipting System'. At the top, there is an orange header with the system name. Below it is a navigation bar with links for 'Home', 'User Services', 'Help', and 'Logout'. A grey bar indicates the user is logged in as '??9646'. The main content area has a title '28060068 - Delete Placement for Joe Blows' and a confirmation question: 'Are you sure you want to delete the placement for Joe Blows on course 28060068?'. At the bottom, there are two buttons: 'Delete' and 'Cancel'.

NOTE: An enrolment may only be deleted if the learner has been enrolled on the same day as you are deleting the enrolment, or when the programme has not started.

Parking screen

Use the Parking screen to “park” an enrolment partway through data entry. You would do this if you need time to clarify data or obtain missing data before continuing.

The screen appears after clicking the Park button on any of the [enrolment](#) screens:

The screenshot shows the 'Electronic Receipting System' interface. The page title is 'Training Opportunities Enrolment - Parking'. It includes a navigation menu with 'Home', 'User Services', 'Performance Dashboard', 'Disciplinary Approval', 'Help', and 'Logout'. Below the navigation, it says 'You are logged in as diacey'. The main content area has a text input field labeled 'Comment (why you are parking the form):' and two buttons: 'Park this form' and 'Cancel'. Two callout boxes are present: one pointing to the comment field with the text '1. Explain why you are parking the enrolment.' and another pointing to the 'Park this form' button with the text '2. Then click the "Park this form" button.'

Notes:

- Parking an enrolment saves information you have entered on all four of the enrolment screens, not just the one you clicked the Park button in.
- When you “un-park” an enrolment, remember to update the learner’s start date.

FIELD, BUTTON, LINK	COMMENTS
Comment	Explain why you are parking the enrolment. For example “Waiting for the Client Basic Details Report”, “waiting for MoE letter”, and so on.
Park This Form button	Click to confirm that you want to park the enrolment. The screen you originally came from appears (Programmes List or Programme Details).
Cancel button	Click this to cancel the park. Everything you’ve entered will be lost.

Record Outcome screen

The Record Outcome screen is used to record a learner's labour market outcome. Note that:

- ERS will not allow you to do this until two months after withdrawal.
- If an outcome is overdue by 30 days (that is, at 90 days), ERS will automatically set the outcome to Unknown.
- After 30 days, or after an outcome has been entered, only TEC may change an outcome.

The screen appears after clicking a [Record Outcome](#) link in the Programme Details screen.

Electronic Receiving System Tertiary Education Commission
Te Amorangi Mātauranga Matua

Home | User Services | Performance Dashboard | Discretionary Approval | Help | Logout

You are logged in as dlacey

12345678- ABC Co Ltd (TOP)

Record Outcome

Personal Details

NSN	0123456789
Name	Fred Dagg
Learner start date	5/9/2011
Learner end date	9/12/2011

Learner Destination

Further Education | **Employment** | Other

Employment Outcome: [Dropdown menu] *

Employer Details

Employer name: [Text field] *

Contact person: [Text field] *

Contact phone number: ([Text field]) [Text field] *

Fax number: ([Text field]) [Text field]

E-Mail: [Text field]

Learner destination relates to programme:

Comments: [Text area]

Add Another Employer

Save Outcome Cancel

1. Enter all relevant data into the screen.
IMPORTANT: Make sure you complete the correct tab ("Further education", "Employment", or "Other").

2. Click this button if there is more than one employer (that is, for part-time outcomes). Then complete the additional fields that appear.

3. When you have finished entering everything, click the Save Outcome button.

NOTE: Which fields are visible depends on which tab you select ("Further training", "Employment", or "Other"). The list below shows all possible fields, even though some don't appear on all tabs.

FIELD, BUTTON, LINK	COMMENTS
TOP OF SCREEN	
NSN Name Learner start date Learner end date	Use this information to confirm you've selected the correct learner.
FURTHER TRAINING TAB	
Training outcome	Select from the drop-down list.
TEO name	Name of the TEO.
Contact person Contact phone number Fax number Email	Contact person at the employer or TEO, and their contact details.
Learner destination relates to programme	Select this if the learner destination is relative to the programme the learner has withdrawn from.
Comments	Any additional comments you would like to make about the outcome.
EMPLOYMENT TAB	
Employment outcome	Select the learner's labour market outcome from the drop-down list.
Contact person Contact phone number Fax number Email	Contact person at the employer and their contact details.
Learner destination relates to programme	Select this if the learner destination is relative to the programme the learner has withdrawn from.
Comments	Any additional comments you would like to make about the outcome.
Add Another Employer button	Click this if there is more than one employer (that is, for part-time employment). More fields appear allowing you to enter the second employer.
Remove button	Only visible if more than one employer has been entered. Click this button to remove the employer.
OTHER TAB	
Other outcome	Select from the drop-down list.
Comments	Any additional comments you would like to make about the outcome.
BOTTOM OF SCREEN	
Save Outcome button	Click this to save the outcome.
Cancel button	Click this to cancel recording the outcome. Everything you've entered will be lost.

Withdraw Learner screen

IMPORTANT: If the enrolment was made in error, then:

- Send a “Placement in Error” form to the TEC Service Centre to action this for you.
- The TEC will then use the information you provide to identify any payment adjustments that may be needed. (The form is available on www.tec.govt.nz.)

The Withdraw Learner screen appears after clicking the [Withdraw](#) link in the Programme Details screen. Use it when a learner is withdrawing from a programme before the programme end date.

The screenshot shows the 'Withdraw Learner' screen in the Electronic Receiving System. The page header includes the system name and the Tertiary Education Commission logo. A navigation bar contains links for Home, User Services, Performance Dashboard, Discretionary Approval, Help, and Logout. The user is logged in as 'dlacey'. The page title is 'Withdraw Learner' and the user ID is '12345678- ABC Co Ltd (TOP)'. The form is divided into three main sections: Personal Details, Withdrawal Details, and Reason for Withdrawal. The Personal Details section shows fields for NSN (0125857865), Name (Fred Dagg), and Learner start date (01/02/2012). The Withdrawal Details section has fields for Withdrawal date and Last date of attendance, both with day, month, and year input boxes. The Reason for Withdrawal section has three tabs: Further Education, Employment, and Other. The Further Education tab is selected, showing fields for TEO Name, Programme Name, Hours per week, Contact person, Contact phone number, and a checkbox for 'Learner destination relates to programme'. At the bottom are 'Save Withdrawal' and 'Cancel' buttons. Two callouts provide instructions: '1. Enter all relevant data into the screen. IMPORTANT: Make sure you complete the correct tab ("Further education", "Employment", or "Other").' and '2. When you have finished entering everything, click the Save Withdrawal'.

Notes:

- Which fields are visible depends on which of the three tabs is selected (“Further education”, “Employment”, or “Other”). The list below shows all possible fields, even though some don’t appear on all tabs.
- All fields entered under “Further education” and “Employment” must be verified when entered.

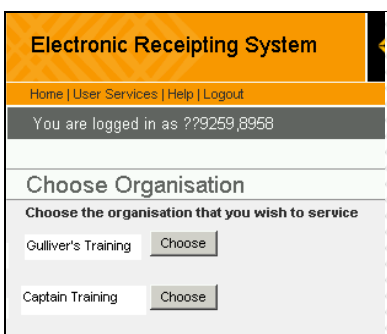
FIELD, BUTTON, LINK	COMMENTS
NSN Name Learner start date	Use this information to confirm you've selected the correct learner.
Withdrawal date	Date of withdrawal. May be different from last date of attendance.
Last date of attendance	The last day the learner attended the programme maybe different from the withdrawal date. Refer the Foundation Focused Training Opportunities Handbook (available from www.tec.govt.nz).
Reason for withdrawal	Select Employment, Further training, or Other.
Employer name	Name of the learner's employer.
TEO name	Name of TEO.
Programme name	The name of the programme the learner has enrolled on.
Hours per week	Hours per week in employment or further training.
Contact person	Contact person for the employer or TEO.
Contact phone number	Contact person's phone number.
Save Withdrawal button	Click this to save the withdrawal.
Cancel button	Click this to cancel the withdrawal. Everything you've entered will be lost.

Screens: Security

This group of screens help protect ERS from unauthorised use. The screens are listed in alphabetical order.

Choose Organisation screen

This screen only appears if the user has authorisation to act on behalf of more than one organisation. For those users, the Choose Organisation screen appears after clicking the [Login](#) button in the Login screen:



The screenshot shows the 'Electronic Receiving System' header. Below it is a navigation bar with 'Home | User Services | Help | Logout'. A status bar indicates 'You are logged in as ??9259,8958'. The main content area is titled 'Choose Organisation' and contains the instruction 'Choose the organisation that you wish to service'. There are two options: 'Gulliver's Training' and 'Captain Training', each with a 'Choose' button.

Click the Choose button next to the TEO you want to work as. The [Programmes List](#) screen appears.

NOTE: You can only be logged in to one TEO at a time.

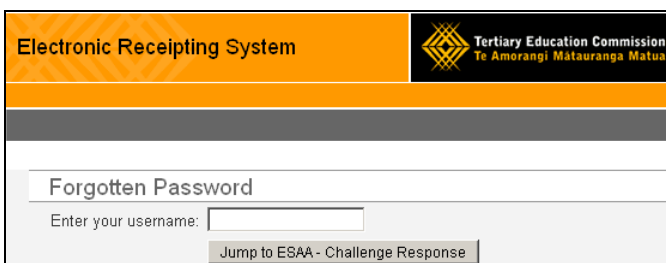
Change organisation when already logged in

To change TEO when you are already logged in:

- Click the [User Services](#) menu
- Select "Change your currently selected organisation"

Forgotten Password screen

Use the Forgotten Password screen when you need you've forgotten your password and need a new one. The screen appears after clicking the [Forgotten password](#) link on the Login screen.



The screenshot shows the 'Electronic Receiving System' header with the Tertiary Education Commission logo. Below it is a navigation bar. The main content area is titled 'Forgotten Password' and contains the instruction 'Enter your username:'. There is a text input field for the username and a 'Jump to ESAA - Challenge Response' button.

Enter your ERS username and click the button. This will take you to a ESAA security webpage. Follow the instructions.

Login screen

Use the Login screen to log into ERS. To display it, enter the following address in your web browser (Internet Explorer or similar): <http://service.tec.govt.nz>.

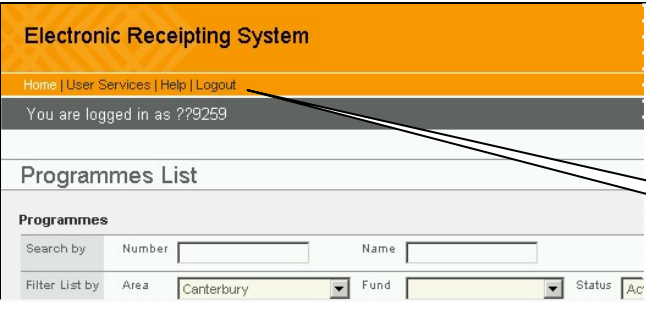
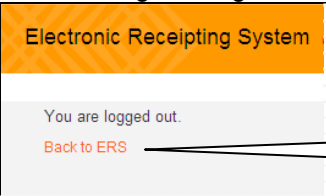
The login screen appears.

1. Enter username and password.
2. Click the Login button.

FIELD, BUTTON, LINK	COMMENTS
Username	Enter your username. (Obtaining username and password describes how to obtain a username and password.)
Password	Enter your password. Notes: <ul style="list-style-type: none"> ▫ See Obtaining username and password if you don't have a username and password. ▫ Use the Forgotten Password link (see below) if you have a username but have forgotten your password.
Login button	Enter your username and password and then click to log in. Notes: <ul style="list-style-type: none"> ▫ For users set up to work on only one TEO, the Programmes List screen appears. But for users set up to work on multiple TEOs, the Choose Organisation screen appears. ▫ You will be automatically logged off if you stop using ERS for 30 minutes. You will lose any information you have not parked.
Clear button	Click to remove all text from the Username and Password fields.
Forgotten Password link	Click if you've forgotten your password. The Forgotten Password screen appears.

Logout screen

Log out of ERS, like this:

ACTION	COMMENTS
1. Click the Logout menu item	 <p>Electronic Receipting System</p> <p>Home User Services Help Logout</p> <p>You are logged in as ??9259</p> <p>Programmes List</p> <p>Programmes</p> <p>Search by Number <input type="text"/> Name <input type="text"/></p> <p>Filter List by Area <input type="text" value="Canterbury"/> Fund <input type="text"/> Status <input type="text" value="AC"/></p>
2. Logout screen appears	<p>After clicking the Logout menu item, the Logout screen appears:</p>  <p>Electronic Receipting System</p> <p>You are logged out.</p> <p>Back to ERS</p> <p>NOTE: If you now click the "Back To ERS" link, the "Login" screen reappears.</p>

IMPORTANT: Always log out when you've finished, to avoid unauthorised access to ERS.

Quick-reference

This summarises how to carry out various tasks in ERS:

TOPIC	ACTION	HOW TO DO IT
Enrolment	Amend learner details	<ul style="list-style-type: none"> Click Amend link next to the learner (in the Programme Details screen)
	Delete placement	<ul style="list-style-type: none"> Click Delete placement link next to the learner (in the Programme Details screen). You may only delete an enrolment on the same day or when the programme has not yet started. If parked, click Delete link next to the parked enrolment (in the Programmes List screen)
	Enrol	<ul style="list-style-type: none"> Click Enrol link next to the programme (in the Programmes List screen); OR Click Enrol link in the Programme Details screen
	Park	<ul style="list-style-type: none"> Click Park button on any of the Enrolment screens: <ul style="list-style-type: none"> Personal Details Eligibility Details (Training Opportunities) Eligibility Details (Youth Guarantee) Statistical Information Travel Costs Pre-confirmation screen
	Record outcome	<ul style="list-style-type: none"> Click Record Outcome link next to the learner (in the Programme Details) screen
	Resume after parking	<ul style="list-style-type: none"> Click Select link next to the parked enrolment (in the Programmes List screen)
	Switch to different programme	<ul style="list-style-type: none"> If you are in the Programme Details screen and want to start enrolling learners in a different programme, click the Home menu and return to the Programmes List screen.
	Withdraw	<ul style="list-style-type: none"> Click Withdraw link next to the learner (in the Programme Details screen) If the enrolment was processed in error, also send a "Placement in Error" form to the TEC Service Centre.
Learner	...	<ul style="list-style-type: none"> See relevant entries under "Enrolment" in this quick-reference
Log in	...	<ul style="list-style-type: none"> See descriptions under Logging in and Login screen
Log out	...	<ul style="list-style-type: none"> Click Logout menu
Organisation	Change	<ul style="list-style-type: none"> See description under Change organisation when already logged in
Outcomes	...	<ul style="list-style-type: none"> See relevant entries under "Enrolment" in this quick-reference
Park	...	<ul style="list-style-type: none"> See relevant entries under "Enrolment" in this quick-reference
Password	Change	<ul style="list-style-type: none"> Click User Services menu, then click "Change your password"
Password	Obtain	<ul style="list-style-type: none"> See description under Obtaining username and password
Placement	...	<ul style="list-style-type: none"> See relevant entries under "Enrolment" in this quick-reference
Programme	List all	<ul style="list-style-type: none"> Display Programmes List screen
	View details	<ul style="list-style-type: none"> Display Programme Details screen

TOPIC	ACTION	HOW TO DO IT
Security	...	<ul style="list-style-type: none"> • See entries in this quick-reference under: <ul style="list-style-type: none"> Log in Log out Organisation Password Username
Username	Obtain	<ul style="list-style-type: none"> • See description under Obtaining username and password