

**Amendment to the
Agreement between**



**The Deputy Chief Executive
Ministry of Social Development**

And

(Education Provider Name)

To:

**VERIFY STUDENT ENTITLEMENT AND ELIGIBILITY FOR STUDENT ALLOWANCES
AND STUDENT LOANS
(VERIFICATION OF STUDY MATCH)**

**PART 10 OF THE PRIVACY ACT 1993
SECTIONS 226A AND 238B OF THE EDUCATION ACT 1989**

OCTOBER 2014

VARIATION REPORT (Number 1) to the Information Matching Agreement/Technical Standards Report between _____ and the Ministry of Social Development for the Verify Student Entitlement and Eligibility for Student Allowances and Student Loans (Verification of Study) Match.

1. BACKGROUND

- 1.1. The Education Provider/MSD Information Matching Programme between MSD and all Education providers under Part 10 of the Privacy Act 1993 and Sections 226A and 238B of the Education Act 1989 was first implemented in 1998 (Student Allowances) and 1999 (Student Loans).
- 1.2. The Ministry assumed responsibility for the administration of the Student Allowances scheme on 01 January 1999. Management of the Student Loan scheme was transferred to the Ministry on 01 January 2000.
- 1.3. The Information Matching Agreement between the Chief Executive of Ministry of Social Development and the <<appropriate delegate for each Education provider>> dated 01 November 2001 was subsequently replaced by the 2011 Information Matching Agreement which this match currently operates under.
- 1.4. Cabinet made the decision in August 2013 [CAB min (13) 29/13] to extend eligibility for certain programmes of study (Youth Guarantee programmes, and fees free Level 1 and 2 qualifications) to other age groups. It also made corresponding changes to the eligibility criteria for Student Loans.

2. VARIATION TO APPENDIX 1: TECHNICAL STANDARDS REPORT

2.1. Remove the following sections

- 2.1.1. "2.1 The information held by the Ministry to be used for the purposes of this information matching programme will be extracted from the SAL system. This is the Government's computer system for the assessment and payment of Student Allowances, Student Loans and holds all information pertaining to applicants for a Student Allowance or a Student Loan. The SAL system database is held on a HP Unix server under Oracle 10.2 located at Lane Street, Upper Hutt, and is accessed and updated remotely in an on-line mode by StudyLink officers at StudyLink sites nation-wide."
- 2.1.2. "9.1.4 The Ministry's request will seek confirmation of the programme codes, the commencement and expected cessation dates, the EFTS values and the start and end dates of any breaks in the program that are greater than three weeks, and additionally (where the Student wishes to have their fees paid by Loan and for fees scholarships) the total and outstanding compulsory fees. Where required by the Ministry, the Education Provider shall provide such further information as the Ministry is entitled to require under sections 226A and 238B of the Education Act 1989 (see clause 2.4 of the Agreement). The Education Provider will provide this information directly to the Ministry who will then make a final assessment of the Student's entitlement."
- 2.1.3. "9.2.5 Automated status reports will be transmitted either faxed or via VoS Online to the Education Provider on a weekly basis. The reports will include details of each Student's loan application and notify any outstanding items of information or evidence. The information exchanged in this part of the match is

described in section 10.6.”

2.1.4. “10.5.2 The information exchanged is as follows:

Information supplied by the Ministry	Information supplied by Education Providers
Full name	Full name
Date of birth	Date of birth
Client Number	Client Number
Education Provider's Student ID Number	Education Provider's Student ID Number
Study Period Start Date	Study Period Start Date ⁵
Application Sequence Number ¹	Application Sequence Number ⁶
Study Period Component Number ⁶	Study Period Component Number ⁶
Fee Information: V: study details F: study details and fees ²	Not known, unregistered, pending, withdrawal, or mismatch on ID, DOB or full name
	Programme Code
	Start date of study period- TOTAL
	End date of study period- TOTAL
	EFTS value of programme of study – TOTAL
	Start and end dates of study periods (up to 4 study periods can be advised)
	EFTS values (up to 4 programmes can be advised)
	Start and end dates of vacation periods exceeding 3 weeks (up to 2 vacation periods can be advised)
	Total compulsory fees
	Fees Request

2.1.5. “10.6.1 Status reports are sent to Education Providers providing information for those Students that have indicated that they want their fees paid for by the Student Loan. Student Loan Status reports will be automatically issued by the Ministry to the Education Provider on a weekly basis, or such other frequency elected by the Education Provider.”

2.1.6. “11.5 Frequency of Automated Status Reports

The Ministry will issue Status Reports to the Education Provider on a weekly basis unless the Education Provider requests more or less frequency.”

2.2. And replace them with:

2.2.1. “2.1 The information held by the Ministry is to be used for the purposes of this information matching programme will be extracted from the SAL system. This is

¹ This field is no longer used and will always contain 1

² Fee information is only requested when a student indicates they want their fees to be paid from their loan.

the Government's computer system for the assessment and payment of Student Allowances, Student Loans and holds all information pertaining to applicants for a Student Allowance or Student Loan. The SAL system database is held on a HP Server under Oracle 11gR1 located at the Rivera Data Centre in Alexander Road, Upper Hutt and is accessed and updated remotely in an on-line mode by StudyLink officers at StudyLink sites nation-wide."

2.2.2. "9.1.4 The Ministry's request will seek confirmation of the programme codes, the commencement and expected cessation dates, The EFTS values and the start and end dates of any breaks in the program that are greater than three weeks, the Source of Funding code, and additionally (where the Student wishes to have their fees paid by Loan and for fees scholarships) the total and outstanding compulsory fees. Where required by the Ministry, the Education Provider shall provide such information as the Ministry is entitled to require under sections 226A and 238B of the Education Act 1989 (see clause 2.4 of the Agreement). The Education Provider will provide this information directly to the Ministry who will then make a final assessment of the Student's entitlement."

2.2.3. "9.2.5 Automated status reports will be transmitted either faxed or via VoS Online to the Education provider on a no less than weekly basis. The reports will include details of each Student's loan application and notify any outstanding items of information or evidence. The information exchanged in this part of the match is described in section 10.6."

2.2.4. "10.5.2 The information exchanged is as follows:

Information supplied by the Ministry	Information supplied by Education Providers
Full name	Full name
Date of birth	Date of birth
Client Number	Client Number
Education Provider's Student ID Number	Education Provider's Student ID Number
Study Period Start Date	Study Period Start Date
Application Sequence Number ³	Application Sequence Number ⁶
Study Period Component Number ⁶	Study Period Component Number ⁶
Fee Information: V: study details F: study details and fees ⁴	Not known, unregistered, pending, withdrawal, or mismatch on ID, DOB or full name
	Programme Code
	Start date of study period- TOTAL
	End date of study period- TOTAL
	EFTS value of programme of study – TOTAL
	Start and end dates of study periods (up to 4 study periods can be advised)
	EFTS values (up to 4 programmes can be advised)

³ This field is no longer used and will always contain 1

⁴ Fee information is only requested when a student indicates they want their fees to be paid from their loan.

	Start and end dates of vacation periods exceeding 3 weeks (up to 2 vacation periods can be advised)
	Total compulsory fees
	Fees Request
	Source-of-Funding Code

2.2.5. "10.6.1 Status reports are sent to Education Providers providing information for those Students that have indicated that they want their fees paid for by the Student Loan. Student Loan Status reports will be automatically issued by the Ministry to the Education Provider on a no less than weekly basis, or such other frequency elected by the Education Provider."

2.2.6. "11.5 Frequency of Automated Status Reports

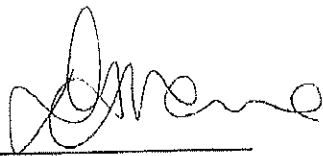
The Ministry will issue Status Reports to the Education provider on a no less than weekly basis unless the Education Provider requests more or less frequency."

3. OTHER TERMS AND CONDITIONS

3.1. The terms and conditions of the Technical standards Report in Appendix 1 remain unchanged by this Variation Report (number 1), except as changed by the variations set out above.

3.2. MSD will ensure that a copy of this signed amendment to the Agreement is provided as soon as possible to the Office of the Privacy Commissioner.

4. SIGNED BY THE PARTIES



 Debbie Power
 Deputy Chief Executive
 On behalf of
 Ministry of Social Development

 On behalf of

Date: 17/9/2014

Date: _____