



Education & Skills
Funding Agency

FE Workforce Staff Data Collection Support Manual Academic year 2020 to 2021

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2 Version control

Version	Date issued	Description
1.0	12 July 2021	Initial public beta release
2.0	26 August 2021	Second public beta release
Version 2 document updates based on user research and sector feedback		

3 Introduction

This document provides guidance for meeting the requirements for returning the annual FE workforce staff data collection.

The document assists providers in preparing and returning the staff data collection using the following methods:

- Online form
- XML upload
- Desktop application alongside the template file

The document includes guidance and examples for completing the return.

4 Terminology

The terms 'we', 'our', 'us' and 'ESFA' all refer to the Education and Skills Funding Agency.

When we refer to 'you' or 'providers' this includes further education colleges, Institutions, training organisations, local authorities and employers who receive funding from us to deliver further education and training.

When we refer to 'the collection' (unless otherwise specified) refers to the staff data collection.

5 What is FE Workforce staff data collection?

The collection of staff data from learning providers in the Further Education (FE) and Skills sector in England.

6 Scope of the collection

6.1 Organisations in scope

Providers should complete a return if they receive funding through one or more of the following funding models and do not return the Schools Workforce census or the HESA staff record.

- *16-19 (excluding Apprenticeships)*
- *Adult skills*
- *Apprenticeships (from 1 May 2017) including Levy funding*
- *Community Learning*
- *European Social Funding (ESF)*
- *Other Adult*
- *Other 16-19*

This will include:

- FE Colleges
- Sixth Form Colleges
- Local Authorities
- Independent Training Providers
- Employer Providers
- Third Sector and Voluntary organisations.

If education or training provision is a small part of the organisation's activities, only return data for staff members who are directly supporting and delivering education or training and meet the criteria for the types of roles specified.

If the organisation's provision is entirely further education and training, return data for staff members who meets the criteria for the types of roles specified. [Refer to section 6.5 Staff roles in scope.](#)

Any staff member in a specified role employed by any of the organisation types listed above who contributes to the delivery or support of FE education or training is to be recorded in their employer's staff data return.

6.2 Non ESFA funded provision

Include staff members who contribute to or support both non ESFA and ESFA funded education or training, even if the staff member spends most of their

time providing education or training that is a non ESFA funded provision.

You do not have to include any staff solely providing education or training that isn't funded through one of the funding models.

6.3 Organisations not in scope

The following providers are not in scope for the collection.

- Schools and Academies who return the Schools Workforce Census
- HE institutions who return the HESA staff record
- Organisations not in receipt of ESFA funding

6.4 Employer providers

For Employer providers the scope of the collection is limited to those who are employed for the purpose of delivering, managing or supporting off the job training to their employees. Staff whose main role is not related to the delivery of training or learning would not be in scope even if they provide on the job training in their area of expertise as part of their role.

6.5 Staff roles in scope

Organisations should complete a return for staff members that have one or more contracts of employment with you, the provider, during the 2020/2021 academic year (1 August 2020 to 31 July 2021) and the individual works in one or more of the specified job roles for the scope of this collection.

Data must be collected for all staff that contribute to the delivery of ESFA funded further education or training provision. This includes staff members that spend any of their time working on ESFA funded training regardless of their main job role.

Recording leavers

Staff members that have left the organisation during the academic year must be included in your return.

You should tell us about the following types of staff that are employed by the organisation.

Staff role job titles or the job position name vary between providers. The following job roles listed are examples and not exclusive to the types of staff roles collected.

6.5.1 Senior Leader

A senior leader is regarded as a staff member who has senior management responsibility. This can include formal governance and director responsibilities. They can be responsible for direction and vision, driving strategic intent.

Job role / title can be known as:

- *Principal*
- *Vice-principal*
- *Director*

- *CEO*
- *Head of FE service or training*

6.5.2 Manager

A staff member responsible for providing supervision and staff support. Responsibilities can include department lead and administering staff members.

Job role / title can be known as:

- *Functional or people manager*
- *Faculty, department, curriculum, or programme lead*
- *Advanced practitioner*

6.5.3 Teacher

A member of staff with teaching responsibilities even if it's not their main role.

Job role / title can also be known as:

- *Lecturer*
- *Teacher*
- *Trainer*
- *Tutor*

6.5.4 Teaching Support

A member of staff supporting teaching responsibilities even if it's not their main role.

Job role / title can also be known as:

- *Teaching assistant*
- *Mentor*
- *Assessor*

6.5.5 Administration

Staff members who support the delivery of further education provision in an administrative capacity

Job role / title can also be known as:

- *Technology support staff*
- *Human resources (HR)*
- *Finance roles*
- *Admission and back office staff*
- *Employer engagement staff*

6.6 Staff roles not in scope

You do not need to complete a staff record for an individual for the following types of staff:

- *Agency staff*
- *Self-employed or freelance staff*
- *Staff working for a provider through an intermediary, such as a personal service company*

You do not need to complete a staff record for any individuals in support roles that are not directly supporting learning such as:

- *housekeeping/cleaning staff*
- *catering assistant/cook/chef*
- *driver/transport manager*
- *maintenance worker*
- *handy person*
- *caretaker/grounds person*
other such service ancillary support roles.

6.7 Is the collection a mandatory requirement?

The first collection for academic year 2020 to 2021 is voluntary, however providers are encouraged to make a return for the following reasons:

- to provide an initial view of the sector to support policy development and feedback useful data to the sector

- to familiarise with the collection and administration required in order to meet requirements
- to allow us to work with the sector to refine the collection, ensuring user needs are being met

Subsequent collections will be mandatory.

7 What data is collected?

A broad scope of personal data is being collected, along with some special category data. All data collected adheres to GDPR regulations and other legal requirements (such as the Further and Education Act 1992) including the specific exceptions required for special category data.

7.1 Special category data

The special category data collected is staff member disability and staff member ethnicity.

7.2 Relevant data

The data collected has been focused so that only information that is relevant to specific members of staff. For example if a member of staff has teaching responsibilities, then data will be collected on that staff member around their teaching experience and qualifications. For members of staff with no teaching responsibilities, no additional data is collected.

8 Privacy and how we use data

Refer to the [FE Workforce document collection page](#) on GOV.UK for the privacy notice about how data is used.

8.1 Security of data

The development of the collection will be security assured through standard DfE policy and process, including authority to operate (AtO).

The personal data will be held within the Submit Learner Data (SLD) environment which is an existing secure platform. Only staff that manage the data will have access granted to them to various data fields

The specific access to the data will be agreed with analysts and similar (who do it already for the Staff Individualised Record collection (SIR)) as to what they will have and where they will be doing it. The data will be pseudonymised before analysis similar to what is already implemented for the Individual Learner Record (ILR) collection.

There will be a named data set but analysts will see a pseudonymised / pseudo-anonymous version of the data set only holding the information that the downstream staff will require when data requirements are finalised (this is in development). This would be implemented within SLD to populate the analysis and stats databases. Pseudo-anonymous data is personally identifiable information such as first name and last name within a data record that are replaced by one or more artificial identifiers.

For avoidance of doubt, analysts will not have access into the production databases.

8.2 Data required to complete the collection

Data items required for staff members will vary. For example, some staff members might not have teaching responsibilities (figure 1). Subsequent data items related to the 'teaching responsibilities routing question' will not appear as part of the collection for these types of staff members.

Gladys Mills

Do they have any teaching responsibilities?

This is in addition to their job role responsibilities

Yes

No

Figure 1 Routing question example

8.2.1 Full list of data items

The collection is split into 3 categories:

1. *Personal details*
2. *Job role details*
3. *Employment details*

Personal details is the only category where all data items will be collected for staff members. Job role details and employment details will vary between staff members.

Categorised data items:

1. *Personal details data items*
 - a. *First name*
 - b. *Last name*
 - c. *Date of Birth*
 - d. *Gender*
 - e. *Ethnicity*
 - f. *Disability*

2. *Job role details data items*
 - a. *Job roles selection*
 - b. *Main role*
 - c. *Head of the FE Provision*
 - d. *Main subject/vocational subject taught*
 - e. *Highest qualification taught*

- f. Staff member highest English qualification*
- g. Staff member highest maths qualification*
- h. Staff member teaching qualification*
- i. Teacher qualification currently studying*
- j. Teaching qualification funding*
- k. Professional teaching status*
- l. Industry experience duration*
- m. Current industry experience outside of FE*

3. Employment details data items

- a. Number of contracts with the provider*
- b. Type of contract*
- c. Weekly hours*
- d. Full time equivalent (FTE)*
- e. Annual salary*
- f. Hourly rate*
- g. Weekly contracted hours*
- h. Contract type*
- i. Number of contracts*
- j. Employment start date*
- k. Employment end date*
- l. Current position duration*
- m. Further education employment duration*
- n. Reason for leaving*

9 Frequency of the collection

The data is collected annually for the academic year specified. There will be a collection window at the end of each academic year allowing reasonable time to return data.

9.1 Timescales

The collection window for 2020 to 21 will run from 12 July 2020 to 24 September 2021.

You can record data at any time while the collection window is open. The collection will close at 4pm on the last day of the collection window.

10 Preparing for the collection

It's recommended to prepare and collate data prior to using either of the collection methods available.

Administration and storage methods vary between providers. Some may use a combination of paper based and electronic files others may use a management information (MI) system.

It's advised to collate staff details before using either of the collection methods. This will help reduce the burden when inputting or transferring staff file data.

10.1 Example scenario where a provider uses multiple methods for storing their staff members data.

It's likely the provider is an ITP with a small number of staff and may opt to use the online form for recording the collection.

The provider stores paper CV's containing staff members qualification details and previous employment details. The same provider has an electronic database storing ethnicity details, consent form to use this and the staff members date of birth.

For recording data the provider would need to have at hand the paper CV and the electronic database of details of the staff members to record for the collection.

11 Making the return

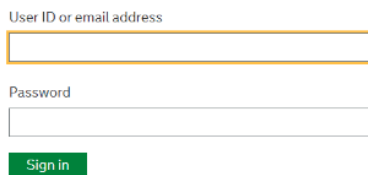
The FE Workforce data collection facility is hosted within the submit learner data (SLD) secure platform. Providers must have an Identity and Access Management System (IDAMS) account and associated profile to access the FE Workforce data collection methods.

Begin the data return process from the submit learner data (SLD) start page. <https://submit-learner-data.service.gov.uk> . Users will then sign into IDAMS (figure 2).

11.1 Identity and Access Management System (IDAMS)

All providers will need an IDAMS account.

Sign in



User ID or email address

Password

Sign in

Problems signing in?

[I forgot my password](#)

[I don't have an account](#)

Figure 2 IDAMS sign in screen

Organisations with an IDAMS account and a users assigned with the 'Submit Learner Data – FE Workforce' role, can access the staff data collection using the Submit learner data sign in process: <https://submit-learner-data.service.gov.uk>.

Users will need to request the 'Submit Learner Data – FE Workforce' role from their organisation's super user to access the collection .

Users who are not registered with an IDAMS account, refer to guidance on gov.uk for [details on how to register](#). This also includes guidance on requesting role permissions.

11.2 FE Workforce Tile

Organisations with users setup or assigned with the 'Submit Learner Data - FE Workforce role' will see the FE Workforce "tile" (figure 3) after logging into the Submit Learner Data portal.

The tile has 2 functions.

- to confirm the FE Workforce profile has been assigned to the user
- provides the link to the collection start page

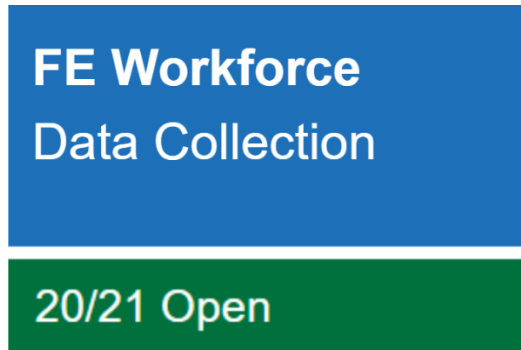


Figure 3 FE Workforce tile

11.3 Who at your organisation should administer the data collection?

Due to special category and sensitive data collected such as salary and date of birth, its recommended that HR administrative team staff who are responsible for the management of employee personal data and have access to it. This can include HR information technology officers (in the case of extracting data from a database). It should be restricted to those with permission to access personal data.

It's also recommended that staff members who are familiar with the organisation's staff data storage methods to complete the collection.

12 Methods for making the data return

Whilst some further education organisations such as independent training providers (ITPs) may only have a few members of staff, some large colleges may have thousands of staff. It is for this reason there are 2 distinct methods available making the data return:

1. Online form

- a. *takes approximately 5 minutes to complete per staff member*
- b. *is designed for providers with up to 30 members of staff but can be used by providers with higher staff numbers*
- c. *uses familiar web page buttons and check boxes*
- d. *contains guidance throughout*

2. XML file upload:

- a. *Data can be prepared with your own software or by using our free bespoke Staff Data desktop application (windows users only) and template document*
- b. *Designed for providers with higher staff numbers but can be used by smaller providers*
- c. *Zip file compatible*
- d. *Data sheet is prepared offline and can be saved*
- e. *intended but not exclusive for providers with higher numbers of staff, for example, more than 30*

12.1 Choosing a collection method

Providers can use either the online form or the XML file upload method to record data as illustrated in figure 4. Each method has been designed to reduce the administration burden taking into account the variation in numbers of staff between providers.

Record staff data: select method

Submissions must use either the online form or an XML file.

Overview

- Use the online form service to record staff member data individually
- XML file data can be prepared and generated [using our desktop application](#) or your own system for bulk uploading of staff data

Select an option

Use the online form service

Upload an XML file

[Continue](#)

Figure 4: Select a method for recording staff data

Either method allows for the collection to be completed in one sitting or in unlimited sittings. Administrators can return to the online form or XML source file to add additional details, edit or complete the collection as many times as they wish while the collection is open.

Providers can use either method for this data collection.

The following describes scenarios using the two methods available for the return.

12.2 Using the online form for returning data

The online form has been designed for providers with lower numbers of staff to record on the collection. Staff data is added per member of staff.

The online form provides a typical group of question pages with standard and familiar page controls such as buttons to save and continue or links to go back to a previous page, selectable options and text input boxes. Refer to figures 5,6,7.

Examples of standard online form page controls



Figure 5 Save and continue button

<input checked="" type="radio"/>	Psychology
<input type="radio"/>	Religious studies
<input type="radio"/>	Sociology
<input type="radio"/>	Other

Figure 6 'radio' buttons

<input type="text"/>	hours per week
----------------------	----------------

Figure 7 Text-input field example

12.2.1 Details to complete for each staff member

The online form has 3 short 'task' elements with sub pages to complete for each staff member.

At the end of each task or at the start of the form filling 'journey', a 'task' screen showing what has been completed or not started will display. Refer to Figure 8.

Example illustrating the staff member's personal information has been completed. Information 'tags' are applied automatically to other sections showing 'not started'. The staff list link provides navigation to the staff list page.

Gladys Mills	
FE workforce staff data collection	
Staff member data	
You have completed 1 of 3 sections	
Personal information	COMPLETED
Job role	NOT STARTED
Employment contract	NOT STARTED
Staff list	

Figure 8 Staff member data task screen with 1 section out of 3 completed

Figure 9 illustrates the following:

- *a staff member's personal information has been completed*
- *job role details is in progress (partially completed)*
- *employment contract details not started*

Information 'tags' are applied automatically to help identify which sections are completed, not started or in progress.

Gladys Mills	
FE workforce staff data collection	
Staff member data	
You have completed 1 of 3 sections	
Personal information	COMPLETED
Job role	IN PROGRESS
Employment contract	NOT STARTED
Staff list	

Figure 9 Staff member data task screen showing 1 section completed, 1 section in progress, 1 section not started

12.2.2 Standardised form page design and usage

Online form pages are grouped in a particular order for the 'screen flow' to make sense. All page content and screen flows have been through user research and testing sessions culminating in the current live version.

12.2.3 Example of a screen flow

A question page with the first option selected as the response.

Gladys Mills

What qualifications or programmes do they teach?


Select an option

Academic qualifications
A levels and GCSEs

Vocational programmes
BTECS, apprenticeships, traineeships, T levels

Other learning programmes
Functional skills English, Maths and IT, ESOL, SEN or supported learning, Preparation for work and life skills, Community learning and Family

[Continue](#)



The proceeding screen is directly related to the response from the previous screen.

Gladys Mills

What is the main academic subject area they teach?

Select a main subject area. Can be A level or GCSE

Ancient Languages

Archaeology

Astronomy

Art and Design, History of Art

Biology

Chemistry

Citizenship studies

12.2.4 Error messaging

Error messages provide help to fixing a problem.

Messages are standardised using familiar gov.uk error message design techniques.

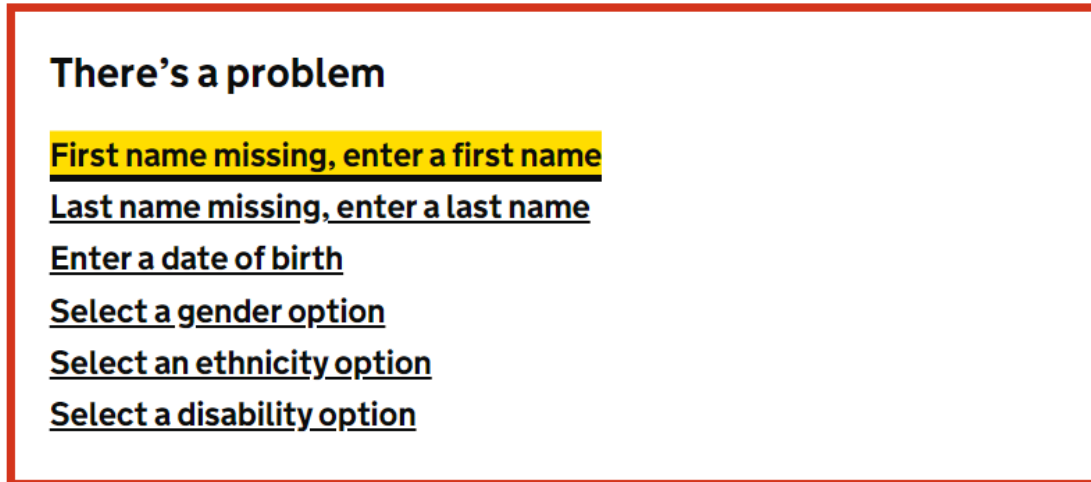


Figure 10 Example error summary box. Error summaries link to the area on a page for making corrections

12.3 Using XML file upload for returning data

For full XML file technical specifications, validation rules, XSD and an XML file example refer to the FE Workforce specification on GOV.UK.

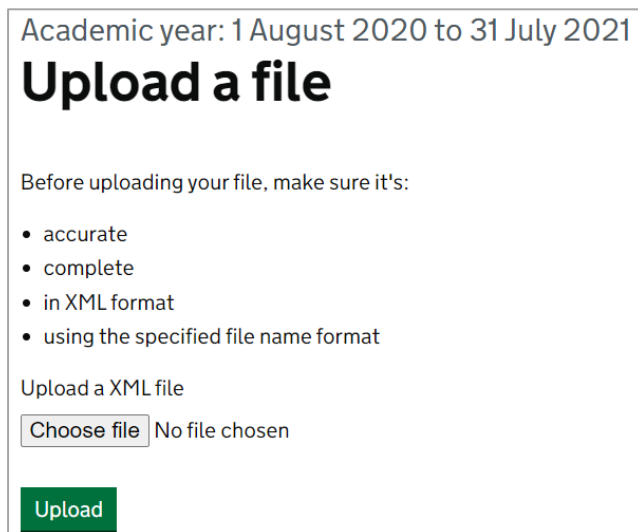
12.3.1 XML file upload Overview

Staff data can be prepared for uploading by using your own software or by using our excel template file along with the bespoke [Staff Data desktop application](#). (windows users only).

12.3.1.1 Check reports

Reports must be checked after uploading a file. Errors in the uploaded XML data file are contained in the report files.

Selecting 'Upload an XML file' option illustrated in Figure 4, flows directly to the file upload interface which provides the facility to choose your file and upload it into the collection system. (figure 11)



Academic year: 1 August 2020 to 31 July 2021

Upload a file

Before uploading your file, make sure it's:

- accurate
- complete
- in XML format
- using the specified file name format

Upload a XML file

No file chosen

Figure 11 File upload interface module

12.3.2 File upload errors

File upload error detection will stop the upload progressing. Some errors won't be detected until after uploading. Reports must be checked after uploading a file.

The validation rules document clarifies all rules related to staff data XML file upload.

Some examples where file upload is prevented where any of the following are true:

- *Incorrect file extension*
- *Incorrect file name format*
- *Attempting to upload the same file with the same filename that has already been uploaded*

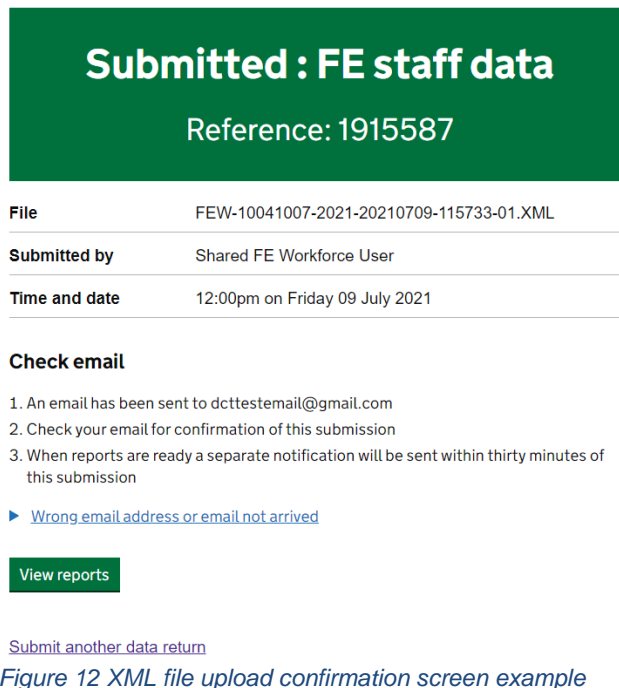
12.3.3 Data errors: checking reports after uploading a file

Reports must be checked after uploading a file.

The reports may contain error summaries for data uploaded. Errors must be corrected and a new file uploaded to replace the previously uploaded file that contained data errors.

Reports are generated after uploading an XML file.

A link to view reports is found on the upload confirmation screen (figure 12) and on the submissions reports page (figure 13)



The screenshot shows a confirmation screen for an XML file upload. At the top, a green banner displays 'Submitted : FE staff data' and 'Reference: 1915587'. Below this is a table with three rows: 'File' (FEW-10041007-2021-20210709-115733-01.XML), 'Submitted by' (Shared FE Workforce User), and 'Time and date' (12:00pm on Friday 09 July 2021). Underneath the table is a 'Check email' section with three numbered instructions and a link for 'Wrong email address or email not arrived'. A 'View reports' button is located below the instructions, and a 'Submit another data return' link is at the bottom.

File	FEW-10041007-2021-20210709-115733-01.XML
Submitted by	Shared FE Workforce User
Time and date	12:00pm on Friday 09 July 2021

Check email

1. An email has been sent to dctestemail@gmail.com
2. Check your email for confirmation of this submission
3. When reports are ready a separate notification will be sent within thirty minutes of this submission

[▶ Wrong email address or email not arrived](#)

[View reports](#)

[Submit another data return](#)

Figure 12 XML file upload confirmation screen example

Submissions

FE staff data collection

Academic Year 2020 to 2021

Date	File	Submitted by	Reference	Reports
9 July 2021 at 12:00pm	FEW-10041007-2021-20210709-115733-01.XML	Shared FE Workforce User	1915587	Download reports

Figure 13 Submissions reports page

12.3.4 Updating and overwriting previous data recorded

Only 1 XML file can be uploaded at a time. The last file uploaded overwrites all staff data previously recorded with us in the same academic year including data recorded using the online form method.

For example, a provider uploads an XML file with staff data. The provider then makes changes to the source file and reuploads their XML file. The data previously recorded with us is now overwritten with new file data.

Once uploaded, staff data can be viewed and edited by using the online form.

12.3.5 Filename of the XML staff data file (extracted from the staff record specification)

FE Workforce Staff files must be given a 36-character filename followed by the XML file extension. The filename format is as follows and is not case sensitive:

FEW-LLLLLLLLL-YYYY-yyyymmdd-hhmmss-NN.XML where:

- FEW
- LLLLLLLL is the UK provider reference number (UKPRN)
- YYYY the year of collection (for example 2020 to 2021 would be 2021)
- yyyymmdd-hhmmss Date/time stamp from provider MIS on file generation
- NN The serial number of the file, this can always be defaulted to 01

Each element is separated by hyphens.

12.4 Using a combination of the online form and XML file upload methods for recording data

The collection systems allow for using both the online form and XML file upload for recording data.

Attempting to use a combined method may result in data loss if you aren't familiar with the processes required.

It's advised to use only one of the collection methods for your initial data return reducing the burden should data become accidentally overwritten.

12.4.1 Using the online form to record data and then upload an XML file

If you use the online form to record staff members and then upload an XML file for the same return with additional staff members (not including the original staff members) data previously recorded through the online form in the current academic year will be overwritten by the last XML file uploaded from your organisation.

12.4.1.1 Example scenario where staff data can be accidentally overwritten

1. *Initially you use the online form to record 12 staff member's data manually.*
2. *You then upload an XML file with additional staff members but excluding the previous 12 members of staff that were recorded using the online form*
3. *The 12 staff members previously recorded are now overwritten and cannot be retrieved*
4. *The solution to re-record the overwritten staff member data is to include the data on the same source XML file and re-upload with a new file name or add them individually using the online form*

12.4.2 Using an XML file for your data return and making changes using the online form

If you upload staff data in an XML file for your return, you can then use the online form to check details, make changes, delete, add new members of staff.

Data changes made using the online form will supersede data on the uploaded XML file. The XML file remains on the system archive.

12.4.3 Example scenario uploading an XML file and modifying data using the online form

1. *You use a spreadsheet or the staff data desktop application to prepare data for your return and output an XML file.*
2. *You upload the XML file.*
3. *You can then view and modify staff details through the online system. Any modifications using the online system will display as the latest data collection for the organisation.*

13 Data fields and guidance

The following uses plain English data field names and reference guidance for completing the collection.

13.1 First name

The first name or forename of the member of staff known by the organisation. This might not be the staff member's legal name but the name used within the organisation.

Please ensure spelling and case sensitivity is correct e.g. John Smith not JOHN SMITH. Many names include characters with accents and other diacritics that are not supported by the standard ASCII character set. The general policy is to support all Latin-based characters but not non-Latin characters.

This field should not include maiden names for example Mary Jones - nee Smith / Mary Jones - was Smith

The field does not accept numeric values for example Richard1st.

13.2 Last name

The surname or family name of the member of staff known by the organisation. This might not be the staff member's legal last name but the name used within the organisation.

Please ensure spelling and case sensitivity is correct e.g. John Smith not JOHN SMITH. Many names include characters with accents and other diacritics that are not supported by the standard ASCII character set. The general policy is to support all Latin-based characters but not non-Latin

characters.

This field should not include maiden names for example Mary Jones - nee Smith / Mary Jones - was Smith

The field does not accept numeric values. For example, Johnson3.

13.3 Date of Birth

The date of birth of the member of staff

There is an upper and lower limit predefined for a staff member's date of birth. Staff members must be at least 16 years old and the upper age limit is 115. The system will provide error messaging when inaccuracies are detected.

13.4 Gender

The declared gender of the member of staff.

Options are:

- *Male*
- *Female*
- *Identifies in another way*
- *Prefer not to say*

13.5 Ethnicity

The collection's ethnicity list uses the latest Office for national statistics (ONS) ethnicity groups and sub group options based on the 2021 census.

The ethnic origin of the staff member.

Ethnic group options are:

- *White*
 - *English, Welsh, Scottish, Northern Irish or British*
 - *Irish*
 - *Gypsy or Irish Traveller*
 - *Roma*
 - *Any Other White background*

- *Mixed/Multiple ethnic groups*
 - *White and Black Caribbean*
 - *White and Black African*
 - *White and Asian*
 - *Any Other Mixed or Multiple background*

- *Asian/Asian British*
 - *Indian*
 - *Pakistani*
 - *Bangladeshi*
 - *Chinese*
 - *Any other Asian background*

- *Black/African/Caribbean/Black British*
 - *African*
 - *Caribbean*
 - *Any other Black, Black British or Caribbean background*

- *Other ethnic group*
 - *Arab*
 - *Any other ethnic group*

- *Not provided / Prefer not to say*

13.6 Disability

Indicates if the member of staff has reported themselves as having a disability.

Options are:

- *Yes*
- *No*
- *Prefer not to say*

13.7 Job Roles

Staff members can have multiple roles. Record all roles applicable to the staff member. For example, Jenny is a manager and also provides teaching support. Additional data is collected for staff members that have teaching responsibilities.

13.8 Main role

The role where the member of staff spends most of their time. For example For example. Jenny is a manager and also provides teaching support. Her main role is 'Manager' because she spends most of her time working in her managerial role.

Options are:

- *Senior Leader*
- *Manager*
- *Teacher*
- *Teaching support*
- *Administration*

13.8.1 Senior leader

Senior Leader is used here as a generic job role term. Providers may use different job titles e.g. principals, vice principals, senior managers, CEOs, directors.

13.8.2 Manager

Manager is used here as a generic job role term. Providers may use different job titles such as Functional or people manager. Faculty, department, curriculum, or programme lead. Advanced practitioner.

13.8.3 Teacher

A teacher is member of staff who has a teaching role even if this is not their main role. Additional data is collected for staff members that have teaching responsibilities.

Teacher is being used as a generic job role term. Providers may use different job titles for teaching roles for example, lecturer, teacher, trainer, instructor or tutor.

13.8.4 Teaching support

Teaching Support is being used as a generic job role term. Providers may use different job titles for teaching support roles for example, Teaching assistant, mentor, assessor. Additional data is collected for staff members that have teaching responsibilities.

13.8.5 Administration

Those that support the delivery of the FE provision in an administrative capacity such as technology support staff, human resources (HR), finance roles, admission and back office staff.

13.9 Head of FE provision

The member of staff who is the head of FE provision for the provider.

A head of FE Provision can be:

- Principal
- Business owner
- director, CEO
- Head of FE service or training.

The list is not exhaustive but indicates some of the types of heads of provision. Heads of provision can have teaching responsibilities. Additional data is collected for staff members that have teaching responsibilities.

13.10 Teaching responsibilities

Staff members who have not been previously indicated as having teaching responsibilities, must have their teaching responsibility recorded. Additional data items related to what they teach, what experience they have outside of FE and any teaching status qualifications if any are collected.

If a staff member has been indicated as having teaching responsibilities, then additional data items are collected.

13.11 Qualifications or programmes taught

Record the qualifications or programmes taught by staff members with teaching responsibilities.

- Academic qualifications: A levels and GCSEs
- Vocational programmes: BTECS, apprenticeships, traineeships, T levels
- Other learning programmes: Functional skills English, Maths and IT, ESOL, SEN or supported learning, Preparation for work and life skills, Community learning and Family

13.12 Main subject area taught

If a staff member teaches more than one subject, the main subject area taught should be determined by where the most time is spent. For example, Kate teaches Agriculture and horticulture programmes and also teaches

Digital / ICT skills. Her week is split but works more hours teaching agriculture and horticulture which therefore should be recorded as her main subject area taught.

13.13 Highest qualification taught

Staff can teach across multiple qualification levels for different amounts of time duration during the academic year.

Record the highest qualification taught regardless of time spent teaching the highest difficulty level.

Refer to [qualification levels and what they mean](#) on gov uk for additional guidance.

13.14 Staff members highest English qualification

Record the highest English qualification held by staff members that have a teaching role even if it's not their main role.

For the initial collection, 'not known' option is available to record. Subsequent collections will require actual data and the not known option will be removed.

Options are:

- *Level 2 GCSE grade A* - C or equivalent*
- *Level 3 A Level or equivalent*
- *Level 4 Certificate of higher education*
- *Level 5 Foundation degree*
- *Level 6 Undergraduate degree or equivalent*
- *Level 7 Postgraduate degree or equivalent*
- *Level 8 Doctorates, award, certificate diploma in strategic direction*
- *None*
- *Not known*
- *Other*

13.15 Staff members highest maths qualification

Record the highest maths qualification held by staff members that have a teaching role even its not their main role.

For the initial collection, 'not known' option is available to select. Subsequent collections will require actual data and the not known option will be removed.

Options are:

- *Level 2 GCSE grade A* to C or equivalent*
- *Level 3 A Level or equivalent*
- *Level 4 Certificate of higher education*
- *Level 5 Foundation degree*
- *Level 6 Undergraduate degree or equivalent*
- *Level 7 Postgraduate degree or equivalent*
- *Level 8 Doctorates, award, certificate diploma in strategic direction*
- *Other*
- *None*
- *Not known*

13.16 Staff members highest teaching qualification

Collected for staff members that have or had a teaching responsibility regardless of teaching being their main role or not.

Record the highest teaching qualification held by the member of staff.

For the initial collection, 'not known' option is available to record. Subsequent collections will require this data and not known option will be removed.

Options are:

- *Level 3 Award in Education and Training, Level 3 Award in Preparing to Teach in the Lifelong Learning Sector (PTLLS)*
- *Level 4 in Education and Training, Level 4 Certificate in Teaching in the Lifelong Learning Sector*
- *Level 5 in Diploma in Education and Training, Level 5 Diploma in Teaching in the Lifelong Learning Sector (DTLLS), Level 5 Cert Ed*
- *Level 6 Bachelors in Education (BEd), Professional certificate in education (PGCE)*
- *Level 7 Postgraduate Certificate in Education (PGCE)*
- *Level 8 Doctor of Education (EdD)*
- *Working towards a teacher training qualification*
- *Other*
- *None*
- *Not known*

13.17 Staff member working towards a teaching qualification

Collected for staff members who have or had a teaching responsibility and who are or were working towards achieving a teaching qualification regardless of teaching being their main role or not.

Record the teaching qualification the staff member is working towards.

Options are:

- *Level 3 Award in Education and Training, Level 3 Award in Preparing to Teach in the Lifelong Learning Sector (PTLLS)*
- *Level 4 in Education and Training, Level 4 Certificate in Teaching in the Lifelong Learning Sector*
- *Level 5 in Diploma in Education and Training, Level 5 Diploma in*

- *Teaching in the Lifelong Learning Sector (DTLLS), Level 5 Cert Ed*
- *Level 6 Bachelors in Education (BEd), Level 6 Professional certificate in education (PGCE)*
- *Level 7 Postgraduate Certificate in Education (PGCE)*
- *Other*

13.18 Teaching qualification funding method

Collected for staff members who have or had a teaching responsibility and who are or were working towards achieving a teaching qualification regardless of teaching being their main role or not.

Options are:

- *Yes, we're paying for all of it*
- *Yes, we're paying for some of it*
- *No*

13.19 Professional teaching status

Collected for staff members who have or had teaching responsibility in the academic year specified regardless of teaching being their main role or not.

Record the professional teaching status of the member of staff.

Options are:

- *QTS (Qualified Teacher Status)*
- *QTLS (Qualified Teacher Learning and Skills status)*
- *Advanced teacher status (Society for Education and Training)*
- *Chartered teacher status (College of Teaching)*
- *Other*
- *None*
- *Not known*

13.20 Industry experience duration

Prior to working in further education, record the length of time the member of staff spent working in industry in a role relevant to the subject they teach.

This field collects historic relevant industry experience duration before working for the provider.

Collected for staff members who have or had a teaching role which can be alongside any other further education role or as a main role.

Example: If a staff member worked in industry for 3 years 11 months or less than 4 years. Record them using the 1 to 3 option. This is because they have worked in industry for less than 4 years.

Options are:

- *Less than one year*
- *1 to 3 years*
- *4 to 10 years*
- *11 to 20 years*
- *Over 20 years*
- *They haven't had industry experience*
- *Not known*

13.21 Current industry experience

Collected for staff members that have or had a teaching role which can be alongside any other FE role or as a main role.

Indicates whether the member of staff currently works in industry alongside their role in further education.

Options are:

- *Yes*
- *No*
- *Not known*

13.22 Annual salary

Annual Salary is collected for all staff members where they are contractually paid a salary and not an hourly rate.

Do not record both an annual salary and hourly rate for the same staff member in XML file returns. This will result in file errors.

If a staff member holds more than one contract, then their Annual Salary should just be for the main contract. The main contract should be the one that is for the most hours.

Include any London weighting element where applicable for the staff member.

Example: Use the latest gross annual salary (whole number) for the member of staff. For a salary of £27420.52 enter 27420.

13.23 Hourly rate

Hourly Rate should be collected for all staff members who are contractually paid an hourly rate.

Do not record both an hourly rate and annual salary for the same staff member in XML file returns. This will result in file errors.

Use the latest gross hourly rate of pay for the member of staff.
For example, enter 11.36 for an hourly rate of eleven pounds thirty six pence

Include any London weighting element where applicable for the staff member.

13.24 Weekly contracted hours

Providers can set their weekly contracted hours for staff members.

Record staff members weekly contracted hours using their main contract for the most contracted hours.

13.25 FTE

The percentage of a Full Time Equivalent (FTE) year for a member of staff for the reporting period. For example, if a member of staff works full time for the full year, their FTE is 1.0. If a member of staff works 60% of a full time working week for the full year, their FTE is 0.6.

13.26 Contract type

Record the main type of contract that the member holds.

Options are:

- *Permanent*
- *Fixed term*
- *Variable hours*
- *Zero hours*
- *Other*

If a staff member holds more than one contract, then the main contract should be the one that is for the most hours.

If a main contract specifies variable or zero hours then the contract type should be recorded as variable or zero hours and not as permanent or fixed term if applicable.

13.27 Number of contracts

Indicator to determine whether the member of staff holds a single or multiple contracts with the provider.

Options are:

- *One*
- *More than one*

13.28 Employment start date

The contract start date for the member of staff

For employee transfers, use the original employment start date from the transferring employer in the case of TUPE transfers and modification orders.

For example, two colleges have merged, record the original contract start date of the staff member from one of the pre-merger colleges (and not the date that the college had merged).

13.29 Employment end date

Only required when a member of staff has left the organisation during the academic year specified.

Record the employment end date for the member of staff.

13.30 Staff member duration in their current role with the organisation

Record the length of time the member of staff has worked in their current position up to the end of July of the academic year.

Options are:

- *Less than one year*
- *1 to 3 years*
- *4 to 10 years*
- *11 to 20 years*
- *Over 20 years*

If a staff member has worked in their current role for 3 years 9 months or less than 4 years. Record them using the 1 to 3 option. This is because they have worked in their current role for less than 4 years.

13.31 Staff member duration in further education

Record the length of time the member of staff has worked in FE up to the end of July of the academic year.

The length of time the member of staff has worked in further education (FE) either continuous or total if the staff member returns after having a break of employment from FE.

If a staff member has worked in FE 3 years 9 months or less than 4 years. Record them using the 1 to 3 option. This is because they have worked in their current role for less than 4 years.

To confirm if this response can be cumulative or not.

Options are:

- *Less than one year*
- *1 to 3 years*
- *4 to 10 years*
- *11 to 20 years*
- *Over 20 years*
- *Not known*

13.32 Reason for leaving

The reason for leaving given by a member of staff that has left your organisation during the academic year specified for the collection.

Options are:

- *Resignation - job change outside of education*
- *2 Resignation - job change within FE sector*
- *3 Resignation - job change within education but not FE*
- *4 Resignation - career break*
- *5 Resignation - other*
- *6 End of Contract*
- *7 Retirement*
- *8 Redundancy – voluntary*
- *9 Redundancy – compulsory*
- *10 Deceased*
- *11 Other*

13.33 Campus identifier

Most providers do not need to return campus identifier data.

The campus identifier must only be returned where the provider has been notified that they can use this field. If a provider returns the field and it's not been requested to do so, the file will be flagged as containing errors and the correction must be made to remove the data.

The campus identifier field is only available in the desktop application and its template file.

Providers who are using their own systems for the collection do not need to include the field unless they've been notified to do so.

This field records the identifier of a campus within a college group who is no longer a separate legal entity but previously operated as an incorporated college with a UKPRN.

The campus identifier must be linked to a college group with a separate UKPRN.

In all instances refer to the FE Workforce staff record specification for technical guidance.

14 Staff Data Desktop Application: Supporting guidance

14.1 Overview and purpose

General guidance for using the FE staff data (windows) desktop application developed by the Department for Education (DfE).

Providers without a facility to create XML data files can use the bespoke desktop application (windows only) to record and output data to upload to ESFA. A template file to use alongside the application is available for [preparing data](#) before using the application.

The grid-based application is configured for the FE staff data collection and exporting XML data. Data fields and validation rules are inbuilt to assist data quality and error prevention.

For technical specification, XML sample file, template file, and validation rules to meet requirements of the data collection refer to the [FE Workforce Staff Record Specification document](#) on GOV.UK.

14.2 Using the application

Whilst it's possible to manually enter data into the application row by row, the intended method of using the application is to 'paste' data rows into the application interface reducing the administration burden. The excel template published provides data fields in the correct order for preparing data to paste into the desktop application prior to modifying or outputting data as an XML file.

The intended users of the application are those with over 20 members of staff. Prepared data can be pasted into the application reducing the time it takes to administer the collection. Data is exported and uploaded to the online system.

The alternative data collection method is via an online form suitable for providers with lower staff numbers. However, users with high staff numbers can use the online form by choice.

We recommend having data prepared or available in advance of using the application.

14.3 Template excel file

The template is designed for using alongside the application and for no other reason.

Do not return the template file. It will not be accepted as a data return.

An excel template file can be downloaded to assist users planning to use the desktop application and preparing for the collection. The template is structured using data field items in the correct order to use alongside the desktop application.

Data from the template can be copied and pasted in full, into the desktop application for exporting as an XML file and uploaded.

This template does not contain any lookup values or validation.

Users must not reorder the field order in the template file which is the same as the field order in the desktop application. Doing so will result in errors.

14.4 Using the template file: data preparation

Data can be recorded in the template file using either codes or text values detailed in the specification for each field collected.

14.5 Using the template file: recording roles

Roles are recorded in the desktop application by selecting checkboxes. This applies to the following fields:

- Is senior Leader
- Is Manager
- Is Teacher
- Is Teaching support
- Is Administration

Yes/ No/True/False/1/0/blank or empty can be used in the template for the fields that are represented as tick boxes in the desktop application. For example, when pasting from the template into the desktop application, values of 1, True or Yes will display as a ticked checkbox for the role specified and the role is recorded for the member of staff.

14.5.1 Example: values for recording roles using the template

For example, to record a staff member as a teacher in the template you can use either Yes, 1 or TRUE in the Is Teacher column. When this data is pasted into the desktop application, the role for teacher will be ticked. When the data is exported and uploaded as XML, the role of teacher is recorded for the member of staff.

Values of No, False, 0 or blank or empty can be used in the template and will display as an unticked checkbox. The member of staff is recorded as not having that role.

Any other value pasted into the roles fields will also result in an unticked checkbox and the member of staff is recorded as not having that role.

For example, pasting a value of 3 or Teacher into the 'Is Teacher' field into the desktop application from the template, will not result in the member of staff being recorded as having a teacher role.

For all other field values refer to the specification.

Refer to the [FE Workforce Staff Data Specification](#) for the details of Codes and Values.

14.5.2 Copy and paste

Data from the template can be copied and pasted in full into the desktop application for exporting as an XML file and uploaded.

14.5.3 Download the template

The excel template can be downloaded from the [FE Workforce data collection documents](#) page on GOV.UK.

14.6 Download the Staff Data Desktop Application

I.T. policy and problems with unzipping and installing

Some organisations may need to contact their I.T. department to allow for the application to be downloaded, unzipped and installed.

[screenshot of error message- Microsoft licence error]

The application can be downloaded from the FE Workforce application download page. Users will need the FE workforce role assigning to access the FE Workforce 'tile' link.

The latest version of the application will appear at the top of the download list with a version number assigned illustrated in figure 14.

Version	Date and time uploaded	Download Link
2021.0.134	26 July 2021 at 5:08pm	Download 2021.0.134
2021.0.131	26 July 2021 at 4:56pm	Download 2021.0.131
2021.0.124	20 July 2021 at 9:50am	Download 2021.0.124
2021.0.119	14 July 2021 at 3:53pm	Download 2021.0.119

Figure 14 example of the download page for the staff data application

14.6.1 Unzipping the application

After downloading the zip file, extract or unzip the file and the following files and folders will display.

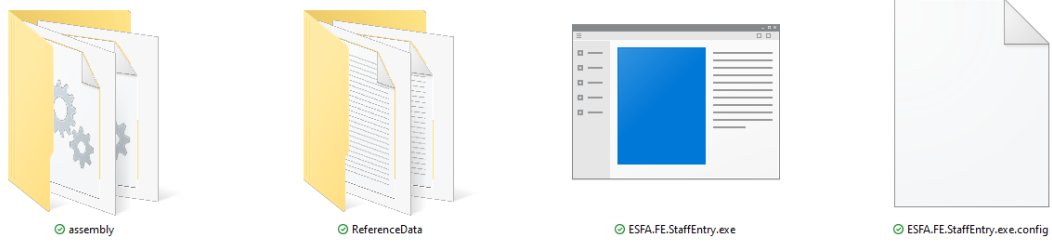


Figure 15 extracted folders and files.

14.6.2 Opening the application

After unzipping or extracting the downloaded file and noting where the zip file was extracted to:

- Navigate to the extracted folder
- Select the .exe (executable) file to open the application (figure 15)

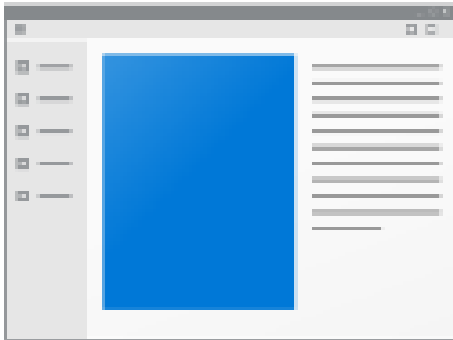


Figure 15 Exe file icon viewed as extra large icon

After selecting or double clicking the exe file, the application opens displaying the main screen (figure 16).

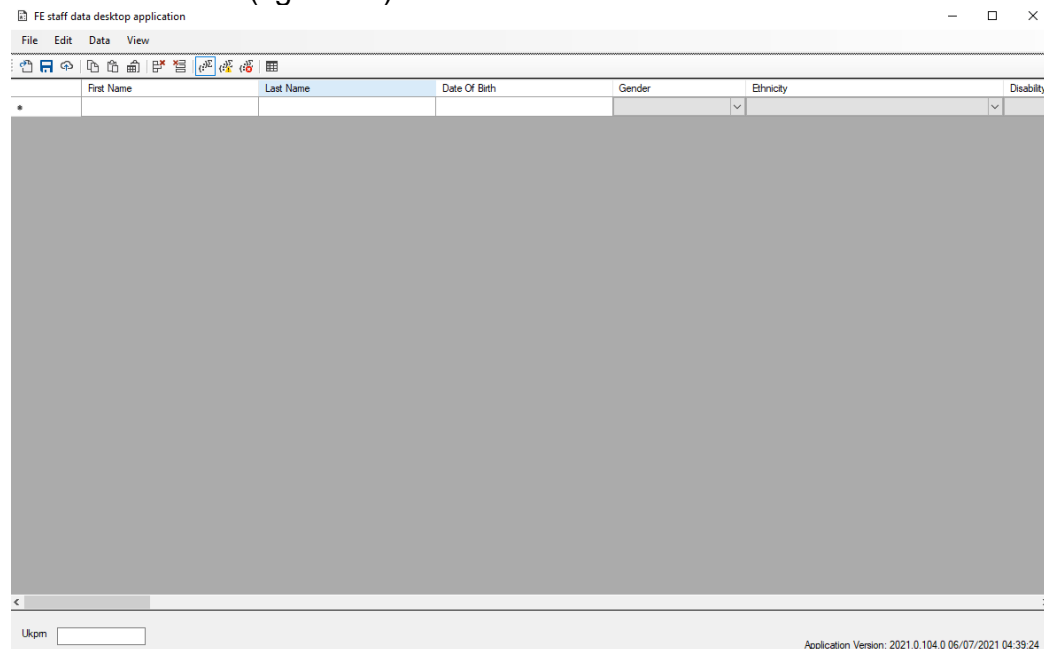


Figure 16 Desktop application interface

14.6.2.1 Getting started

There are 2 ways to use the application:

1. Select file --> open workforce data to open an xml file
2. Select the first left column and paste in data from an external spreadsheet or from the [template file](#).

14.7 Icons and what they mean

14.7.1 Error icon

The icon indicates there's a problem within a cell or row. An icon on the row will indicate that there are one or more issues with the data in the row. There will be additional icons on the cell(s) which contain the error.

Hovering over the icon will display the error message(s).



14.7.2 Viewing error messages

There are 2 ways to view error messages:

1. Right click on any error icon and select [*Show Errors/Warnings*]. All errors for that row will be displayed in a pop out window. Errors can be copied to the clip board from the window. Figure 18.
2. Hover mouse or control device over an error icon. The error for the cell will be displayed.

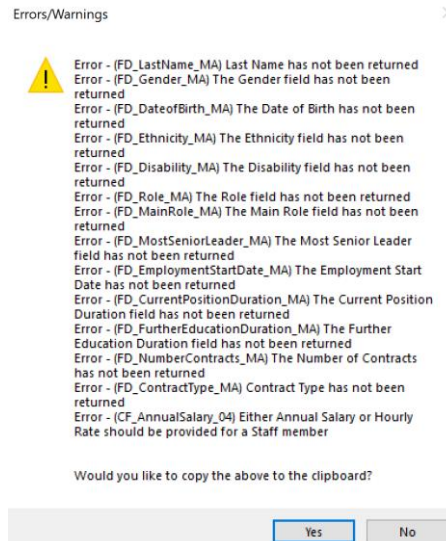


Figure 16 Errors/warnings window

Any of the following will trigger the error icon to display:

- Missing data
- An incorrect option has been selected
- Data is in the wrong format for example 12/13/2021 is incorrect, 13/12/2021 is correct
- Data in fields where data isn't required for example, data in the hourly rate and salary field will trigger an error. We collect either of the data items

14.7.3 Application icon

The application icon will be displayed in the windows taskbar when the application is open. The icon cannot currently be assigned as a shortcut icon to launch the application. Refer to opening the application guidance.



14.8 Menus and the application tool bar icons

14.9 Application Toolbar

The tool bar is anchored to the application and provides the UKPRN input field and quick access to 12 commands otherwise accessed through text menus and sub menu items.

The tool bar and its icons display regardless of an active data sheet or none being displayed.



Tool bar structure:

1. *UKPRN input field*
2. *Open file*
3. *Save Data (use for saving work in progress)*
4. *Export Data (use for final export for uploading)*
5. *Copy selected cells*
6. *Paste item*
7. *Paste as new row(s)*
8. *Delete selected row(s)*
9. *Delete all data*
10. *Show all rows*
11. *Show only rows with warnings (yellow triangle)*
12. *Show only rows with errors (red circle)*
13. *Freeze first and last columns*

14.10 Menus

14.10.1 File menu

The File menu contains 4 options:

1. *Open Workforce data*
2. *Save Workforce data*
3. *Export for upload*
4. *Exit / close application*

14.10.2 File menu overview and icons

14.10.2.1 Open Workforce data

Use this menu item to open files previously saved.
Can users open other files into the app?



14.10.2.2 Saving Workforce data



Work in progress can be saved and reopened. A UKPRN must be entered into the application and is necessary to generate a valid XML file.

Invalid or incomplete files can be saved as work in progress.

Saved files can be used for uploading a data return but may result in errors. Refer to Export menu option guidance.

The save option does not use the 36 character automatic file name required for uploading data.

14.10.2.3 Valid file names

Saving workforce data does not automatically create a valid filename for uploading XML. Refer to export workforce data for filename guidance.

14.10.2.4 Export workforce data for uploading



Use the export menu option to output an XML file for uploading data.

All errors must be fixed before exporting. Attempting to export a file with errors is not possible. A message box stating 'errors must be fixed' will display.

If you wish to save a file that contains errors use the 'save workforce data' option.

The application is constructed so that the exported file name meets file naming validation rules. The XML file from the application uses a 36-character filename followed by the XML file extension.

The predefined filename format is as follows:

FEW-LLLLLLLLL-YYYY-yyyymmdd-hhmmss-NN.XML where:

- *FEW*
- *LLLLLLLLL is the UK provider reference number (UKPRN)*
- *YYYY the year of collection (for example 2020 to 2021 would be 2021)*
- *yyyymmdd-hhmmss Date/time stamp from provider MIS on file generation*
- *NN The serial number of the file, this can always be defaulted to 01*

14.10.2.5 Using XML files from other types of data record system

For full technical guidance refer to the FE Workforce Staff Record Specification to meet the technical requirements of the data return.

14.10.2.6 Uploading an XML file

Refer to guidance: Upload a file using via the FE staff data collection upload facility.

14.10.3 Edit menu

The Edit menu contains 3 options:

1. *Copy selected cells*
2. *Paste item*
3. *Paste as new row(s)*

14.10.3.1 Copy selected cells



14.10.3.2 Paste item



14.10.3.3 Paste a new rows



14.10.4 Data menu

The Data menu contains 2 options:

1. *Delete selected row(s)*
2. *Delete all data*

14.10.4.1 Delete selected rows



14.10.4.2 Delete all data



14.10.5 View menu

The View menu contains 4 options:

1. *Show all rows*
2. *Show only rows with warnings (yellow triangle)*
3. *Show only rows with errors (red circle)*
4. *Freeze first and last columns*

14.10.5.1 Show all rows



14.10.5.2 Show only rows with warnings (yellow triangle)



14.10.5.3 Show only rows with errors (red circle)



14.10.5.4 Freeze first and last columns



14.11 Data fields and guidance

There is 1 additional field (Campus Identifier) to record when returning data using XML files. Only return this field if it has been specifically requested.

For all other fields refer to guidance for [data fields collected](#).

14.11.1 UKPRN

The UKPRN is a unique number allocated to providers after successful UKRLP registration. This is an 8-digit number that always start with a 1.

The UKPRN must be recorded in the desktop application. The UKPRN input field is located in the toolbar.

The UK Register of Learning Providers (UKRLP) provide a [search facility to find a UKPRN](#).

15 Reference links

15.1 Identity and Access Management System (IDAMS)

Details on [how to register for an IDAMS account](#). Includes guidance on requesting role permissions.

15.2 Qualifications levels and what they mean

[List of qualification levels](#)

15.3 Submit Learner Data (SLD)

Submit learner data [sign in page](#) is the starting point for the staff data collection.

15.4 Technical specification and related documents

For the staff record technical specification, validation rules, XSD and a sample XML file refer to the [FE Workforce data collection](#) documents on GOV.UK.

15.5 UKPRN

The UKPRN is a unique number allocated to providers after successful UKRLP registration. This is an 8-digit number that always start with a 1.

To find your organisation's UKPRN refer to the [UK Register of Learning providers](#).

Notes