

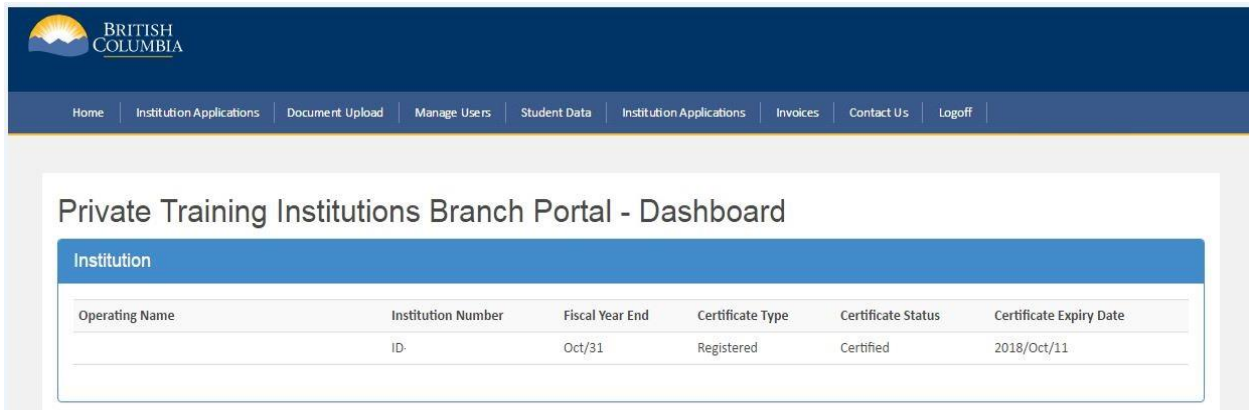
# STUDENT DATA REPORT REFERENCE GUIDE

All certified institutions are required to submit to the registrar, no later than 60 days before the current certificate expiry date, a student data report for each student who was enrolled in, or completed, an approved program during the previous fiscal year. Institutions with no students enrolled at any point during the previous fiscal year are required to provide confirmation of this through the student data page of the [PTIB Portal](#).

NOTE: If an institution submits an application for re-certification 60 days before the current certificate expires, but does not provide student data and financial statements by the required due date, the current certificate remains valid until the registrar issues a new certificate or refuses to issue a certificate. Fees and payments to the Student Tuition Protection Fund for the new certificate, once issued, will only be payable as a lump sum. The institution will not have the option of monthly payments.

Institutions can access their student data report by logging into the [PTIB Portal](#). Select 'View or update student data' in the Tools menu or select the Student Data tab at the top of the page and download the student data report. Only users with administrator permissions can view the Student Data tab of the portal to generate and submit the report. Basic users do not have access to the Student Data section of the PTIB Portal.

If you are the portal user at the institution with administrator access and the Student Data tab is unavailable, please [contact PTIB](#) directly to troubleshoot.



The screenshot shows the PTIB Portal dashboard. At the top is the British Columbia logo and a navigation menu with links: Home, Institution Applications, Document Upload, Manage Users, Student Data, Institution Applications, Invoices, Contact Us, and Logoff. The main content area is titled "Private Training Institutions Branch Portal - Dashboard" and contains a table with the following data:

Institution					
Operating Name	Institution Number	Fiscal Year End	Certificate Type	Certificate Status	Certificate Expiry Date
	ID:	Oct/31	Registered	Certified	2018/Oct/11

From the Student Data page of the PTIB portal:

**Step 1:** Click on Generate Excel Export to download the student data report. If you do not have any student data to report you can go to Step 3 and select "No student or enrollment data to report" from the Select Reason drop-down list.

Step 1: Download current institution student and enrolment data

Click the "Generate Excel Export" button below to download an Excel file containing all of your institution's current Students (if any), Enrolments (if any), Programs, and Locations. If you do not have any student data to report you can jump to Step 3 below and select "No student or enrollment data to report" from the Select Reason pick list.

Generate Excel Export

When you select Generate Excel Export, your student data report will be generated as a Microsoft® Excel workbook with the following tabs:

Tab	Content	Purpose
About	General Instructions	Reference only
Context	Institution Information	Reference only
Student	Student Information	To be completed
Enrollment	Enrollment Events (Start, End and Graduate Follow Up)	To be completed
Programs	Approved programs	Reference only
Locations	Approved Locations	Reference only
Program Location	Approved Program Locations	Reference only
Lookups	References for list of values	Reference only

"Reference only" tabs of the report may not be altered.

**\*NOTE:** Before you begin, review the Programs and Locations listed and if you notice discrepancies between the information in the report and your current programs and locations, please contact your Regulation Administrator or Reception at [PTI@gov.bc.ca](mailto:PTI@gov.bc.ca) for assistance.

If you are using a version of Microsoft® Excel from 2007 or older, you may experience issues with the dropdown menus of the student data report. You can either download a free Excel update, or copy and paste the data from the reference tabs (i.e. Programs, Locations, etc.) to the Enrollment tab within the student data report.

**Step 2:** Complete your student data report.

Step 2: Save the file in Microsoft® Excel and complete the workbook.

Edit/enter your institution's Student and Enrolment data

Student data must be completed in the Excel format. Comma separated value (.CSV) file functionality is not available.

As you complete your student data report, you can save a local copy of the Excel workbook to your computer until the workbook is ready to submit.

For further instructions on completing the student data report, read 'What to Include' and 'Managing Data Accuracy' below.

**Step 3:** Confirm the purpose of the submission from the drop-down list before uploading the report. If you have no student or enrollment data to report, please select the appropriate option from the list.

**Select from one of the following:**

- Update student data only (select if the student data report is in progress)
- No student or enrollment data to report (select if there has been no student or enrollment activity, including no graduate follow up if applicable, within the reporting period)
- Complete for the purpose of re-certification (select if the student data report includes all required data for the previous fiscal year)

**Registered and interim designated institutions will also be able to select from:**

- Complete for confirming eligibility for designation (select if the student data report is updated to include all student data since your most recent report submitted for the purpose of re-certification)

**\*NOTE:** If there are any errors identified in the report, you will be unable to successfully upload the report. You will need to correct the errors and upload the file again.

If there are issues (warnings) identified with the data, you will receive warning messages. You will be prompted to review your data. You do not have to make any changes and may continue with the upload after you have reviewed your submission. If you choose to continue, any changes you made will update previous submissions you may have uploaded. If there are errors identified, you will be prevented from proceeding with the upload until the errors are resolved. See 'Managing Data Accuracy' section below.

Upon successful upload of the report, a data upload summary table will display the total number of rows for each Student and Enrollment tab.

**\*NOTE:** The student data report will NOT be submitted to PTIB until you click the green 'Submit' button.



## What to Include

All certified institutions must provide data for students that:

- Enrolled in an approved program in the institution's previous fiscal year

- Completed an approved program in the institution’s previous fiscal year
- Designated and Interim Designated institutions must also include graduate follow up data for each student in Class A approved programs within 6 months after being granted a credential (Graduate Follow Up Date) in the previous fiscal year. This includes the student’s job title if employed after graduation.

Certificate Type	Programs	Student	Student Start Date	Student End Date	6 Month Follow Up Date
Registered	Approved Programs Only	Y	Y	Y	N/A
Designated	Approved Programs Only	Y	Y	Y	Class A Programs only
Interim Designated	Approved Programs Only	Y	Y	Y	Class A Programs only

In the student data report, there are two tabs or worksheets to complete.

### 1. Student

The Student tab must list each student enrolled in an approved program at an institution. The Student ID Number is a unique identifier (generated by the institution) used by PTIB and the Institution to identify the individual student. A student’s information need only be included in the first submission. Subsequent submissions can include changes or updates to the student information. This will overwrite that student’s previous information based on the Student ID Number.

### 2. Enrollment

The Enrollment tab lists one or more of the events mentioned in the table above, (i.e. Start, End or Graduate Follow Up events). Depending on the institution’s certificate expiry date or fiscal year, a student event may span multiple student data report submissions or institution fiscal years. For example, in the first fiscal year, the enrollment start event may occur. In the second fiscal year, the graduation/credential (end) event may occur. In the third year, the graduation follow up may occur. In this example, an institution would provide a record with all the known event information within each fiscal year’s student data report.

## Notes

- If you do not see your Location & Program in the Enrollment tab column A drop down list, please contact your institution’s Regulation Administrator or Reception at [PTI@gov.bc.ca](mailto:PTI@gov.bc.ca).
- For students enrolled in distance education programs, the location identified with Distance Education in the location name (listed in the Locations tab) should be selected from the Program Location & Title column.

- If an exam for a registered, licensed, certified program has not been scheduled within the 6 month follow up period, choose E (Exam Pending) in the Registered, Licensed, Certified column. If the student has graduated and can be hired to work in the career-related field prior to writing the exam, choose the applicable option in the Follow Up Type column and N under Registered, Licensed, Certified Column.
- If a student was enrolled at your institution then chose to transfer to or enroll in a different program at your institution, select the Withdrawal option from the Program Achievement Type drop down list. An additional entry or line in the Enrollment tab must be created to represent the enrollment in the other program.
- If a student takes a leave of absence, leave the record incomplete until there is an actual 'end date' (i.e. withdrawal, dismissal or certificate granted). PTIB expects the institutions will follow its own policy concerning leaves of absence and may validate that the policy is being applied appropriately.
- For multi-year programs, enter 'Incomplete' as the Program Achievement Status if the student has completed a single year of a multi-year program. Once the student has completed the final year of the program, enter 'Credential' (or Dismissed/Withdrawn, as applicable) as the Program Achievement Status. Therefore, the report should reflect the following, year after year:
  - Year 1 – Incomplete
  - Year 2 – Incomplete
  - Year 3 – Credential

## Managing Data Accuracy

### Key fields

Key fields are included in both Student and Enrollment tabs. These fields are used to link records together between the Student and Enrollment tab as well as identify the key fields used in the PTIB Student Data database.

Tab	Key Fields
Student	Institution ID + Student ID
Enrollment	Institution ID + (Location + Program) + Student ID

### Updating/ Adding Data

To update existing data and/or add new data:

- Click on Generate Excel Export to download your institution's report previously submitted.

**\*NOTE:** Only the records that did not include all required data will be returned. Student records that included the required data for all Student and Enrollment fields will not appear in subsequent downloads and should not be entered again.

- Update the student and enrollment records with the new data.
- Upload the report.

When you upload your student data report, the updated/added data will be merged to existing data in PTIB records.

### Deleting Data

If for any reason, you need to delete data previously submitted:

- Click on Generate Excel Export to download your institution's report previously submitted.
- In the Student tab, select Y for yes under column AA (Delete Flag).
- In the Enrollment tab, select Y for yes under column K (Delete Flag).
- Upload the report.

When you upload your student data report, the rows with the delete columns marked as Y will be deactivated in our records.

**\*NOTE:** Only the records that did not include all required data will be returned when you download your previously submitted report. Student records that included the required data for all Student and Enrollment fields will not appear in subsequent downloads so if you need to delete data that is not being returned in your downloaded report you will need to [contact PTIB](#) with an explanation of why the data needs to be deleted.

### Understanding Data Fields

**\*NOTE:** You **MUST** use the date format and drop-down lists provided in the student data report when completing the report. **DO NOT** re-type the drop-down list options – inadvertently adding or removing a space when re-typing the drop-down list options may result in errors. You can use the copy and paste function, but only use this function once you've already selected one of the drop-down list options.

### Common Error Messages:

- Error message:  
An error occurred while processing your request. Message: Value cannot be null. Parameter name: source  
OR  
An error occurred while processing your request. Message: Sequence contains no elements.

Solution:

Select an option from the dropdown list shown under the Program Title & Location header (Column A) in the Enrolment tab. Free text in this column will not be accepted. If this dropdown list is not visible, the Excel version needs to be updated.

- Error message:  
Student xx is duplicated in upload file. # occurrences were found. Please delete duplicate records.

Solution:

If a student is enrolled in more than one program during the reporting period, the Enrolment tab should reflect each enrolment as a separate row. However, the student should only be reflected once on the Student tab. The same Student Number cannot be associated with the same Program Number more than once

- Error message:  
String was not recognized as a valid DateTime.  
OR  
Not a legal OleAut date

Solution:

All dates must be entered using the YYYY-MM-DD format. If you have downloaded the workbook from the PTI Portal, the date columns will be pre-formatted. If you are copy and pasting values from another source, ensure only the values are pasted and not the formatting.

- Error message:  
Object reference not set to an instance of an object

Solution:

Ensure you are not entering free text into the columns with data validation (dropdown lists). Refer to the Enrolment Table below, which explains the Student ID cell is intended for a unique student identifier that will also be used in the Student tab. Once the Student ID is entered into the Enrolment tab, the Student Name will appear. Do not use free text to enter the student's full name. The upload will not be accepted and the error message above will be displayed.

- Warning message:  
Graduate Follow Up is Due

Solution:

Follow up is required for institutions that hold an interim/designation certificate for Class A programs within 6 months of being granted a credential.

If the student graduated from the program less than six months before the institution's fiscal year end (end of reporting date), the graduate follow up information is not required. This information will be required during the next report. Refer to the example of a December year end: Only students who graduated on or before June 30 are required to have follow ups completed.

All data fields are defined in the student and enrollment tables below. Character limits for text fields are identified in the Type column.

**TABLE: Student**

<b>STUDENT</b> Information about a student			
Column	Type	Values	Definition
Student ID Number	Char (100)	Required Text	A unique student identifier that will also be used in the Enrollment tab.
PEN	Char (9)	Optional	Personal Education Number.
Usual First Name	Char (25)	Optional	Student's commonly used first name.
First Name	Char (25)	Required	Student's first (given) name
Middle Name	Char (25)	Optional	Middle name(s) and/or initials of the student.
Last Name	Char (25)	Required	Student's surname (last name)
Birth Date	Date	Required Valid Date format YYYY-MM-DD	The student's date of birth. Note: Excel cell must be date formatted.
Gender	Char (1)	Optional F, M, X, or U	The student's gender. Gender <ul style="list-style-type: none"> <li>• <b>F - Female</b> Persons whose current gender is female. This includes cisgender and transgender persons who are female.</li> <li>• <b>M - Male</b> Persons whose current gender is male. This includes cisgender and transgender persons who are male.</li> <li>• <b>X – Non-Binary Gender</b></li> </ul>



			<p>Persons whose current gender is not exclusively as male or female. It includes people who do not have one gender, have no gender, are gender fluid, or are Two-Spirit.</p> <ul style="list-style-type: none"> <li>• <b>U – Unknown Gender</b> Persons whose gender is not known at the time of data collection. It may or may not get updated at a later point in time. X is different than U.</li> </ul>
Immigration Status	Char (2)	Required 00, 01, 02, 03,	<p>A Code indicating the immigration status of a student as of the enrollment date.</p> <ul style="list-style-type: none"> <li>• <b>00</b> Canadian Citizen, including Inuit, North American Indian, Metis and naturalized Canadian.</li> <li>• <b>01</b> Permanent Resident, (formerly called landed immigrant) with permanent resident card or letter from Citizenship and Immigration Canada.</li> <li>• <b>02</b> Student Visa: a permit obtained by a student to enter Canada for the sole purpose of attending an educational institution, international student, incoming exchange student.</li> <li>• <b>03</b> Other Visa or Permit, including students who are in Canada on diplomatic, trade or other missions, refugee claimants, visitor visas, international short stay (holiday), work permit other than Live In Caregiver (see 07).</li> </ul>
Citizenship Code	Char (2)	AF, AX, AL, DZ, AS, ... see link for full list	<p>The student's citizenship as of the session start date. Cannot be 'CA' if Immigration Status = 02 or 03 Please refer to the Statistics Canada Country Alpha-2 Codes at <a href="http://www.statcan.gc.ca/eng/subjects/standard/sccai/2011/scountry-desc">http://www.statcan.gc.ca/eng/subjects/standard/sccai/2011/scountry-desc</a></p>
Disability Indicator	Char (1)	Optional Y, N, NULL or Blank	<p>An indication of the student's self-declaration of their disability status to the institution.</p> <ul style="list-style-type: none"> <li>• <b>Y</b> Student has self-declared himself or herself as having a disability.</li> <li>• <b>N</b> Student has self-declared himself or herself as <b>not</b> having a disability.</li> </ul>

			<ul style="list-style-type: none"> <li>• <b>&lt;Blank&gt; or Null</b> Student has not answered the question on the admissions form or has not reported their disability status to the institution.</li> </ul>
Indigenous Indicator	Char (1)	Optional Y, N, NULL or Blank	<p>An indication of the student's self-declaration of their Indigenous identity to the institution.</p> <ul style="list-style-type: none"> <li>• <b>Y</b> Student has declared self as an Indigenous identify individual.</li> <li>• <b>N</b> Student has declared self as <b>not an</b> Indigenous identity individual</li> <li>• <b>&lt;Blank&gt; or Null</b> Student has not answered the question or has not reported their Indigenous identity.</li> </ul>
First Nations Indicator	Char (1)	Optional Y, N, NULL or Blank	<p>An indication of the student's self-declaration of their First Nations identity to the institution.</p> <ul style="list-style-type: none"> <li>• <b>Y</b> Student has declared self as a First Nations individual.</li> <li>• <b>N</b> Student has declared self as not a First Nations individual.</li> <li>• <b>&lt;Blank&gt; or Null</b> - The student has not declared self as a First Nations individual.</li> </ul>
Metis Indicator	Char (1)	Optional Y, N, NULL or Blank	<p>An indication of the student's self-declaration of their Métis identity to the institution. If Indigenous Indicator = Y</p> <ul style="list-style-type: none"> <li>• <b>Y</b> Student has declared self as a Metis individual.</li> <li>• <b>N</b> Student has declared self as not a Metis individual.</li> <li>• <b>&lt;Blank&gt; or Null</b> - The student has not declared self as a Metis individual.</li> </ul>
Inuit Indicator	Char (1)	Optional Y, N, NULL or Blank	<p>An indication of the student's self-declaration of their Inuit identity to the institution. If Indigenous Indicator = Y</p> <ul style="list-style-type: none"> <li>• <b>Y</b> Student has declared self as an Inuit individual.</li> <li>• <b>N</b> Student has declared self as not an Inuit individual.</li> <li>• <b>&lt;Blank&gt; or Null</b> - The student has not declared self as an Inuit individual.</li> </ul>

Perm Address Line 1	Char (254)	Required	Line 1 of the permanent address reported by the student on their application for admission or the most appropriate address maintained by the institution for follow-up surveys of students after graduation. Ensure that city/town, province, country and postal or zip code is reported in elements provided, and not included in this element or the subsequent address lines.
Perm Address Line 2	Char (254)	Optional	Line 2 of the permanent address reported by the student on their application for admission or the most appropriate address maintained by the institution for follow-up surveys of students after graduation. Ensure that city/town, county, province, country and postal or zip code is reported in elements provided, and not included in this element or the subsequent address lines.
City	Char (100)	Required	City or town of the student's permanent address.
Province	Char (2)	Required Province Validation	Province or state of the permanent address. Assign ZY (Not applicable) for addresses outside Canada and the U.S. codes can be found at <a href="https://www.ups.com/worldshiphelp/WS12/ENU/AppHelp/Codes/State_Province_Codes.htm">https://www.ups.com/worldshiphelp/WS12/ENU/AppHelp/Codes/State_Province_Codes.htm</a>
Country	Char (2)	Required AF, AX, AL, DZ, AS, ... see link for full list	Country of the permanent address. Assign ZY (Not applicable) for addresses outside Canada and the U.S. Please refer to the Statistics Canada Country Alpha-2 Codes at <a href="http://www.statcan.gc.ca/eng/subjects/standard/sccai/2011/scountry-desc">http://www.statcan.gc.ca/eng/subjects/standard/sccai/2011/scountry-desc</a>
Postal Code	Char (10)	Required	Postal or zip code of the permanent address.
Current Phone Number	Char (20)	Required	Student's current phone number.
Perm Address Phone Number	Char (20)	Optional	Telephone number at the permanent address. Include the area code.
Email address	Char (100)	Required	The student's e-mail address while enrolled in the program or course(s). Must be in proper email format (TEXT@account.com)
Email address 2	Char (100)	Optional	The student's alternate e-mail address while enrolled in the program or course(s).
Email address 3	Char (100)	Optional	The student's additional optional e-mail address while enrolled in the program or course(s).

Delete Flag	Char (1)	Optional Y, Blank or NULL	Logically delete / remove the student record that may previously been uploaded in this reporting period. Cannot delete a student record if there is an existing enrolment record for that student. <ul style="list-style-type: none"><li>• Y</li><li>• <b>&lt;Blank&gt; or Null</b></li></ul>
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TABLE: Enrollment

<b>STUDENT ENROLLMENT</b>			
Information about a student enrollment start, end and post education employment.			
Column	Type	Values	Definition
Location Name + Program Title	Char (200)	Required Must be a valid location as well as Location / Program approved by PTIB.	Location Name + “[” + Location Code + “] :: ”” + Program Title + “[” + Program Code + “]”
Student ID Number	Char (9)	Required	A unique student identifier that will also be used in the Student tab and once entered, the Student Name will appear
Student Name	Char (25)	Display (lookup)	Last Name, First Name display. <b>Populated once the Student ID Number is entered.</b> Do not use free text to enter the student’s full name. The upload will not be accepted.
Full Time Flag		Required Y, N	Flag to indicate if student is full time. Not Full time is less than 20 hours/ week. <ul style="list-style-type: none"> <li>• <b>Y</b> Full Time</li> <li>• <b>N</b> Not Full Time</li> </ul>
Student Start Date	Date	Required Valid Date format YYYY-MM-DD	The start date of the program of instruction set out in the student enrollment contract. Unless the student has already been reported, the Student Start Date cannot be less than the Student Data Reporting Start Date (previous fiscal start date).
Student End Date	Date	Valid Date format YYYY-MM-DD Optional <ul style="list-style-type: none"> <li>• Must not be less than start date</li> </ul>	Date student ended the program. If the Achievement Status does not equal In Progress or NULL, the End Date is required. Do not enter an end date if the enrolment is still in progress.  Unless the student completed the program during the previous reporting period and the follow up data is now required, the Student End Date cannot be less than the Student Data Reporting Start Date. The Student End Date cannot be greater than the Student Data Reporting End Date in any circumstance.

			For multi-year programs, a Student End Date is required only for the final End Event, not for every program year.
Program Achievement Status	Char (15)	Credential, Dismissed, Withdrawal, Incomplete, In Progress, NULL	<p>The student's achievement at the end of the program reporting period end.</p> <ul style="list-style-type: none"> <li>• <b>Credential</b> Student has received the program credential</li> <li>• <b>Dismissed</b> Student has been dismissed from the program by the institution.</li> <li>• <b>Withdrawal</b> Student has withdrawn from the course after the stable enrollment date; the student will (typically) receive a withdrawal status on their transcript.</li> <li>• <b>Incomplete</b> Student has not completed the program requirements, and has not withdrawn (e.g., did not sit the final exam); the student will (typically) receive an incomplete status on their transcript</li> <li>• <b>In Progress or NULL</b> Student is in progress in the program. This is usually associated for programs that span fiscal year ends. End date cannot be entered for an In Progress enrolment.</li> </ul>
Graduate Follow Up Date	Date	<p>Valid Date format YYYY-MM-DD</p> <p>Must be greater than or equal to end date</p>	Follow Up is required for institutions that hold a Designation or Interim Designation Certificate for Class A programs within 6 months of being granted a credential
Follow Up Type	Char (30)	<p>Employment in career,</p> <p>Employment not in career,</p> <p>Enrolled in further training,</p> <p>International student returned to country of citizenship,</p>	<p>Follow Up is required for institutions that hold a Designation or Interim Designation Certificate for Class A programs within 6 months of being granted a credential.</p> <p>Type of follow up within 6 months of being granted a credential.</p> <ul style="list-style-type: none"> <li>• <b>Employment in career</b> Domestic student obtained employment in career occupation related to the credential</li> </ul>

		International student employed in non-origin country, No possible contact after 3 attempts	<ul style="list-style-type: none"> <li>• <b>Employment not in career</b> Domestic student obtained employment in career occupation not related to the credential</li> <li>• <b>Enrolled in further training</b> Domestic student is enrolled in further training or a post-sec institution</li> <li>• <b>International student returned to country of citizenship</b> International student returned to the student's country of citizenship</li> <li>• <b>International student employed in non-origin country</b> International student obtained employment in country other than the student's country of citizenship</li> <li>• <b>Not employed</b> Domestic student is not employed</li> <li>• <b>No possible contact after 3 attempts</b> Institution is not able to contact student. 3 attempts have been made, last contact date used.</li> </ul>
Job Title	Char (30)	If answer to Follow Up Type = "Employment in Career"	Report the student's job title when reporting the employment outcomes for graduates of Class A programs.
Registered, Licensed, certified	Char (1)	<p>If answer to Follow Up Type = "Employment in Career", must provide answer</p> <p>If answer to Follow Up Type not = "Employment in Career", Blank or NULL</p>	<p>Student is registered, licenced, certified or otherwise recognised by the federal regulator or health regulatory body within 6 months of being granted credential</p> <ul style="list-style-type: none"> <li>• <b>Y</b> Student is registered, licenced, certified or otherwise recognised by the federal regulator or health regulatory body within 6 months of being granted credential</li> <li>• <b>N</b> Student is NOT registered, licenced, certified or otherwise recognised by the federal regulator or health regulatory body within 6 months of being granted credential</li> <li>• <b>U</b> Unknown registration status</li> <li>• <b>E</b> Third Party Exam Pending, Student is waiting for exam date and/or results.</li> </ul>
Delete Flag	Char (1)	Optional	Delete an enrollment record that may previously been uploaded in this reporting period.

		Y, Blank or NULL	<ul style="list-style-type: none"><li>• Y</li><li>• &lt;Blank&gt; or Null</li></ul>
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