

**Revised Business Data Standards**

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Date: 19/08/2015

**Issue**

1. Approval of new and amended standards

**Recommendation**

2. The Board is recommended to approve the changes to standards and controlled lists that are detailed in the tables in Annex A. These changes have been broken down into the respective work packages and are summarised as follows:

**A. Children's Service: Complex Cases and Relationships**

i. Business Data Standards:

- 3 new standards: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Approved: Recommended'

ii. Technical Data Standards:

- 3 new standards: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Approved: Recommended'

iii. Controlled Lists:

- 6 new controlled lists: approve with a status of 'Approved: Recommended'

- Changes to 1 controlled list: approve with a status of 'Approved: Recommended'

## **B. Discount Codes / Points (JCQ RFC 13)**

### **i. Business Data Standards:**

- 1 new standard: approve with a status of 'Approved: Recommended'
- Changes to 2 standards: approve with a status of 'Approved: Recommended'

### **ii. Technical Data Standards:**

- 1 new standard: approve with a status of 'Approved: Recommended'
- Changes to 2 standards: approve with a status of 'Approved: Recommended'

## **C. Grade Sets (JCQ RFC 19)**

### **i. Business Data Standards:**

- 2 new standard: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Deprecated'

### **ii. Technical Data Standards:**

- 2 new standard: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Deprecated'

## **D. Locator**

### **i. Business Data Standards:**

- Changes to 13 standards: approve with a status of 'Approved: Recommended'

## **E. QE Framework (JCQ RFC 14c)**

i. Business Data Standards:

- Changes to 2 standards: approve with a status of 'Approved: Recommended'

ii. Technical Data Standards:

- Changes to 2 standards: approve with a status of 'Approved: Recommended'

**F. QE Preference (JCQ RFC 14a)**

i. Business Data Standards:

- Changes to 1 standard: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Deprecated'

ii. Technical Data Standards:

- Changes to 1 standard: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Deprecated'

**G. Qualification Categories (JCQ RFC 15)**

i. Business Data Standards:

- 1 new standard: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Approved: Recommended'

ii. Technical Data Standards:

- 1 new standard: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Approved: Recommended'

## **H. Subject Classification (JCQ RFC 14b)**

### **i. Business Data Standards:**

- 2 new standards: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Approved: Recommended'
- Changes to 2 standards: approve with a status of 'Deprecated'

### **ii. Technical Data Standards:**

- 2 new standards: approve with a status of 'Approved: Recommended'
- Changes to 1 standard: approve with a status of 'Approved: Recommended'
- Changes to 2 standards: approve with a status of 'Deprecated'

### **iii. Controlled Lists:**

- 2 new controlled lists: approve with a status of 'Approved: Recommended'
- Changes to 2 controlled list: approve with a status of 'Deprecated'
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## **I. Currency Codes**

### **i. Controlled Lists:**

- Change to 1 controlled list: approve with a status of 'Approved: Recommended'

## Background

1. The work areas below were covered by either an approved scoping document, requests for change via stakeholders or improvements identified after the initial release of a standard. Details of the specific updates to the standards are listed in Annex A.
2. **Children's Services: Complex Cases and Relationships** – This work package builds on the existing Children's Services work and data standards. Standards have been developed to better link relationships between cases, parties and organisations.
3. **Locator ID** – Locator ID data type updated to Simple\_String(1,600) for multiple standards.
4. **JCQ Requests For Change** – Requests for change are categorised into the following areas:
  - Currency Codes
  - Discount Codes / Points (JCQ RFC 13)
  - Grade Sets (JCQ RFC 19)
  - QE Framework (JCQ RFC 14c)
  - QE Preference (JCQ RFC 14a)
  - Qualification Categories (JCQ RFC 15)
  - Subject Classification (JCQ RFC 14b)

## Stakeholder Consultation

5. Consultation packs were issued to the Design & Implementation SIG, the Data Architecture SIG and area specific stakeholders as follows:
  - i. Children's Services: Complex Cases and Relationships
    - a. Gate 3: Analysis Consultation (5<sup>th</sup> May – 19<sup>th</sup> May)
    - b. Gate 4: Standards Consultation ( 3<sup>rd</sup> Jun – 12<sup>th</sup> Jun)
    - c. Gate 4: Additional Standards Consultation following on from stakeholder feedback and significant model changes (9<sup>th</sup> Jul

- 23<sup>rd</sup> Jul)

d. Gate 4: Individual Consultation for PR Personal Relationship  
BDS following on from amendments (3<sup>rd</sup> Aug - 10<sup>th</sup> Aug)

e. Gate 4: Individual Consultation for PR Personal Relationship  
Influence BDS following on from amendments (11<sup>th</sup> Aug -  
18<sup>th</sup> Aug)

ii. Locator ID

a. Gate 3: Analysis Consultation (2<sup>nd</sup> Jun – 16<sup>th</sup> Jun)

b. Gate 4: Standards Consultation (9<sup>th</sup> Jul – 23<sup>rd</sup> Jul)

c. Gate 4: Additional Standards Consultation following on from  
stakeholder feedback and significant model changes (5<sup>th</sup> Aug  
- 12<sup>th</sup> Aug)

iii. JCQ Requests For Change

Currency Codes

a. Gate 3: Analysis Consultation (19<sup>th</sup> Jun – 3<sup>rd</sup> Jul)

b. Gate 4: No impact to existing architecture so G4 Standards  
consultation not applicable

Discount Codes / Points (JCQ RFC 13)

a. Gate 3: Analysis Consultation (21<sup>st</sup> May – 5<sup>th</sup> Jun)

b. Gate 4: Standards Consultation (3<sup>rd</sup> Aug – 17<sup>th</sup> Aug)

Grade Sets (JCQ RFC 19)

a. Gate 3: Analysis Consultation (20<sup>th</sup> Jul – 31<sup>st</sup> Jul)

b. Gate 4: Standards Consultation (7<sup>th</sup> Aug – 19<sup>th</sup> Aug)

QE Framework (JCQ RFC 14c)

c. Gate 3: Analysis Consultation (21<sup>st</sup> May – 5<sup>th</sup> Jun)

d. Gate 4: Standards Consultation (9<sup>th</sup> Jul – 23<sup>rd</sup> Jul)

QE Preference (JCQ RFC 14a)

- e. Gate 3: Analysis Consultation (21<sup>st</sup> May – 5<sup>th</sup> Jun)
- f. Gate 4: Standards Consultation (9<sup>th</sup> Jul – 23<sup>rd</sup> Jul)
- g. Gate 4: Additional Standards Consultation following on from stakeholder feedback (3<sup>rd</sup> Aug – 17<sup>th</sup> Aug)
- h. Gate 4: Individual Consultation on AO QE Preference standards (11<sup>th</sup> Aug – 18<sup>th</sup> Aug)

#### Qualification Categories (JCQ RFC 15)

- a. Gate 3: Analysis Consultation (3<sup>rd</sup> Jul – 17<sup>th</sup> Jul)
- b. Gate 4: Standards Consultation (7<sup>th</sup> Aug – 19<sup>th</sup> Aug)

#### Subject Classification (JCQ RFC 14b)

- c. Gate 3: Analysis Consultation (18<sup>th</sup> Jun – 2<sup>nd</sup> Jul)
- d. Gate 4: Standards Consultation (27<sup>th</sup> Jul – 10<sup>th</sup> Aug)

Each consultation period had a deadline of approximately two weeks from the time of distribution. Where minor changes were made the consultation duration would last one week.

- 6. During the review process feedback was received from the following stakeholders:
  - i. Children's Services: Complex Cases and Relationships:
    - Gwen McGill (DfE)
    - Clare McGinn (TSS)
    - Tony Matthews (RM)
    - Cheryl Bachelor (OCR)
    - Barbara Sorkin (Wokingham)
    - Angie Quinn (NHS England)
    - Robert Baldy (SDA)
  - ii. Locator ID
    - Robert Baldy (SDA)

- Tony Matthews (RM)
- Neil Strange (Business Thinking)
- iii. JCQ Requests For Change
  - Caryl Harding (Capita SIMS)
  - Terry Knowles (TSS)
  - Tony Matthews (RM)
  - Chris Wiltshire (JCQ)
  - Clare McGinn (TSS)
  - Stephen Law (Godalming Colege)
  - David Riley (NHS)
  - Tim Wakefield (Pearson)
  - Debbie Middleton (OCR)
- All comments received were recorded in the consultation feedback form, commented against by TSS, resolved and re-distributed.

**Action required by ISB**

7. Approve the changes as explained in Section 2 - Recommendation above.



## Annex A

### CHANGES TO (A) BUSINESS DATA STANDARDS AND (B) CONTROLLED LISTS

#### A. Business Data Standards

Business Data Standard	Action	Standard / Change Description
Personal Group	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
PPA Associate Party	Update	Updated as part of the Children's Services: Complex Cases and Relationships work package. New attributes added: <ul style="list-style-type: none"> <li>• Organisational_Department</li> <li>• PPA_Associate_Party_Local_Id</li> </ul>
PR Personal Relationship	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
PR Personal Relationship Influence	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
QE Learner Booking	Update	Updated as part of the Discount Codes / Points (JCQ RFC 13) work package. Qual_Frmwrk_Level_Type attributed deleted and new non-identifying attribute Qualification_Framework_Level data type Unicode_String(1,20).
QE Outcome	Update	Updated as part of the Discount Codes / Points (JCQ RFC 13) work package. Qual_Frmwrk_Level_Type attribute deleted and new non-identifying attribute Qualification_Framework_Level data type Unicode_String(1,20).
QE Performance Measure	New	Created as part of Discount Codes / Points (JCQ RFC 13) work package.
QE Grade Set	New	Created as part of Grade Sets (JCQ RFC 19) work package.
Qualification Element Grade	Deprecated	Deprecated as part of Grade Sets (JCQ RFC 19) work package. Replaced by QE Grade Set.
Grade Set	New	Created as part of Grade Sets (JCQ RFC 19) work package.
Geographical Unit	Update	Updated as part of Locator ID work package. Geographical Unit CoOrdinates (Geographical_Locator_Id) updated to Simple_String (1,600).
Learning Opportunity	Update	Updated as part of Locator ID work package. Learning Opportunity (Course_Media_URL_Locator_Id)

Business Data Standard	Action	Standard / Change Description
Learning Opportunity Delivery	Update	Updated as part of Locator ID work package. Learning Opportunity Delivery (Delivery_Point_Locator_Id) and Learning Opp Delivery Contact (Locator_Id_Contact) updated to Simple_String (1,600).
Learning Opportunity Enrolment	Update	Updated as part of Locator ID work package. Delivery_Point_Locator_Id updated to Simple_String (1,600).
Learning Opportunity QE Outcome	Update	Updated as part of Locator ID work package. Delivery_Point_Locator_Id updated to Simple_String (1,600).
Locator	Update	Updated as part of Locator ID work package. Locator_ID amended to SimpleString (1,600).
Locator Geographical Unit	Update	Updated as part of Locator ID work package. Locator_ID amended to SimpleString (1,600).
Org Post Fulfilment	Update	Updated as part of Locator ID work package. Locator_ID_Contact amended to SimpleString (1,600) updated to Simple_String (1,600).
Party Contact	Update	Updated as part of Locator ID work package. Locator_ID_Contact amended to SimpleString (1,600) updated to Simple_String (1,600).
Party Personal Assessment	Update	Updated as part of Locator ID work package. Locator_ID_Contact amended to SimpleString (1,600) updated to Simple_String (1,600).
Party Relationship Contact	Update	Updated as part of Locator ID work package. Party Relationship Contact (Locator_Id_Contact) updated to Simple_String (1,600). Party Role Contact (Locator_Id_Contact) updated to Simple_String (1,600).
Premises	Update	Updated as part of Locator ID work package. Locator_ID amended to SimpleString (1,600).
Provider Generic Service Delivery Point	Update	Updated as part of Locator ID work package. Provider GSERV Delivery Point (Locator_Id_PSDP) updated to Simple_String (1,600).
Qualification Element Framework	Update	Updated as part of QE Framework (JCQ RFC 14c) work package. Qual_Frmwrk_Level_Type renamed Qualification_Framework_Level. Entity definition updated accordingly.

Business Data Standard	Action	Standard / Change Description
Qualification Framework	Update	Updated as part of QE Framework (JCQ RFC 14c) work package. Qual_Fmwrk_Level_Type has been renamed Qual_Framework_Level and is no longer bound to a controlled list. Qualification Framework Hierarchy entity deleted
AO QE Preference	Deprecated	Deprecated as part of QE Preference (JCQ RFC 14a) work package. AO QE Preference has now become QE Preference.
QE Preference	Update	Updated as part of QE Preference (JCQ RFC 14a) work package. QE Preferences are now defined by a controlled list. A relationship to QE has been added. Party_Id deleted.
Qualification Category	New	Created as part of Qualification Categories (JCQ RFC 15) work package.
Qualification Element	Update	Updated as part of Qualification Categories (JCQ RFC 15) work package. Deletion of QE_Classification attribute from the Award entity (Delete 1:m non-id relationship from QE Classification entity to Award). Deletion of Qualification_Type attribute from the Scheme entity.
QE Classification	Update	Updated as part of Subject Classification (JCQ RFC 14b) work package. Attribute QE_Classification_Type has been renamed Subject_Classification_Type, and is now associated with the Subject Classification Type controlled list. Definition of QE_Classification amended.
QE Subject Classification	New	Created as part of Subject Classification (JCQ RFC 14b) work package.
QE Subject Sector Area	Deprecated	Deprecated as part of Subject Classification (JCQ RFC 14b) work package. Replaced by QE Subject Classification.
Sector Subject Area	Deprecated	Deprecated as part of Subject Classification (JCQ RFC 14b) work package. Replaced by Subject Classification.
Subject Classification	New	Created as part of Subject Classification (JCQ RFC 14b) work package.

## B. Technical Data Standards

Technical Data Standard	Action	Standard / Change Description
Personal Group	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
PPA Associate Party	Update	Created as part of the Children's Services: Complex Cases and Relationships work package.
PR Personal Relationship	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
PR Personal Relationship Influence	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
QE Learner Booking	Update	Updated as part of Discount Codes / Points (JCQ RFC 13) work package. Rename element Qual_Frmwrk_Level_Type to Qualification_Framework_Level.
QE Outcome	Update	Updated as part of Discount Codes / Points (JCQ RFC 13) work package. Rename element Qual_Frmwrk_Level_Type to Qualification_Framework_Level
QE Performance Measure	New	Created as part of Discount Codes / Points (JCQ RFC 13) work package.
QE Grade Set	New	Created as part of Grade Sets (JCQ RFC 19) work package.
Qualification Element Grade	Deprecated	Deprecated as part of Grade Sets (JCQ RFC 19) work package. Replaced by QE Grade Set.
Grade Set	New	Created as part of Grade Sets (JCQ RFC 19) work package.
Qualification Element Framework	Update	Updated as part of QE Framework (JCQ RFC 14c) work package.
Qualification Framework	Update	Updated as part of QE Framework (JCQ RFC 14c) work package.
AO QE Preference	Deprecated	Deprecated as part of QE Preference (JCQ RFC 14a) work package. AO QE Preference has now become QE Preference.
QE Preference	Update	Updated as part of QE Preference (JCQ RFC 14a) work package. Data block AOQEPreference_DS and several elements have been renamed. Element Party_ID_Creator has been deleted.

Technical Data Standard	Action	Standard / Change Description
Qualification Element	Update	Updated as part of Qualification Categories (JCQ RFC 15) work package. Delete element QE_Classification from the node Award. Delete element Qualification_Type from the node Scheme.
Qualification Category	New	Created as part of Qualification Categories (JCQ RFC 15) work package.
QE Classification	Update	Updated as part of Subject Classification (JCQ RFC 14b) work package. Change element name QE_Classification_Type to Subject_Classification_Type.
QE Sector Subject Area	Deprecated	Deprecated as part of Subject Classification (JCQ RFC 14b) work package. Replaced by QE Subject Classification.
QE Subject Classification	New	Created as part of Subject Classification (JCQ RFC 14b) work package.
Sector Subject Area	Deprecated	Deprecated as part of Subject Classification (JCQ RFC 14b) work package. Replaced by Subject Classification.
Subject Classification	New	Created as part of Subject Classification (JCQ RFC 14b) work package.

### C. Controlled Lists

Controlled List	Action	Standard / Change Description
Parental Responsibility Type	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
Party Relationship Role Reference Type	Update	Updated as part of the Children's Services: Complex Cases and Relationships work package. New value added: <ul style="list-style-type: none"> <li>NHS Reference Number</li> </ul>
Personal Group Type	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
Personal Relationship Basis Type	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
Personal Relationship Influence Type	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
Personal Relationship Role Name Type	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
Personal Relationship Role Type	New	Created as part of the Children's Services: Complex Cases and Relationships work package.
QE Classification Type	Deprecated	Deprecated as part of the Subject Classification (JCQ RFC 14b) work package. Replaced by Subject Classification Type.
Sector Subject Area Level Type	Deprecated	Deprecated as part of the Subject Classification (JCQ RFC 14b) work package. Replaced by Subject Clas Level Type.
Subject Clas Level Type	New	Created as part of the Subject Classification (JCQ RFC 14b) work package.
Subject Classification Type	New	Created as part of the Subject Classification (JCQ RFC 14b) work package.
Currency Tye	Update	Updated as part of the Currency Codes work package. Existing values deleted and replaced with: <ol style="list-style-type: none"> <li>EUR (Euro)</li> <li>GBP (Pounds Sterling)</li> </ol>

<b>Controlled List</b>	<b>Action</b>	<b>Standard / Change Description</b>
		c. USD (US Dollar) d. ZAR (South African Rand)

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