Universal Primary Free School Meals:
1 September 2022

The development of universal primary free school meals data and educational software solutions for the 2022/2023 academic year

Specification for software suppliers

Date of issue: 17 May 2022
Version: 0.1

Audience	Software suppliers of school management information systems.
Overview	This document is provided by the Welsh Government as a specification to support the above audience in developing their educational software systems to ensure that schools in Wales can use and process the data required to manage schools effectively.
Action required	For schools in Wales to be able to function efficiently, the Welsh Government recommends that software suppliers of school management information systems and partner software suppliers, such as cashless catering software suppliers and data aggregator supplers, that have customers in Wales take full consideration of this specification document when developing their systems.
Further information	Enquiries about this document should be directed to: Information Management Strategy Data Collections Team School Information and Improvement Branch Education Directorate Welsh Government Cathays Park Cardiff CF10 3NQ Tel: 0300 062 5014 E-mail: IMS@gov.wales @WG_Education Facebook/EducationWales
Additional copies	This document can be accessed from the SDF pages of DEWi.
Related documents	The latest version of **Modular CBDS** should be used in conjunction with this specification and can be found in the SDF area of the DEWi (Data Exchange Wales Initiative) website.

Contents

1. Change log

	Specification needed for the introduction of the UPFSM policy from 1 September 2022
Issue 1	Following the Ministerial Written Statement issued on 17 December 2021, the Welsh Government are introducing a new universal primary free school meals policy. Further information on the policy can be found at the above linked written statement.

2. Introduction

This brief specification describes the content of the universal primary free school meals (UPFSM) educational software systems solution for Wales. It applies to all maintained settings and should be introduced from **1 September 2022**.

There is no intention, at present,for the Welsh Government to collect this data and this solution is developed moreso to ensure consistency of processes and usage with the introduction of the Welsh Government's UPFSM policy.

Developing a solution in line with this specification will ensure the data is implemented, recorded and used consistently across Wales, which will future proof the policy should there be a future requirement to collect the data, for examples, as a part of the Pupil Level Annual School Census (PLASC).

2.1 Key principles

The below solution is required to be implemented at an individual learner level.

For management information system (MIS) software suppliers, the data should be implemented consistently in line with this specification.

Partner software suppliers, such as cashless catering and data aggregator software, should configure their software to take account of the below solution consistently so that all relevant data elements are factored into solutions.

The below data items will be defined in the relevant Common Basic Data Set (CBDS) documentation for Wales, to be updated once a feasible solution is agreed.

2.2 Purpose of the free school meals data requirements

Eligibility for free school meals

In Wales, the existing eligibility for free school meals (eFSM) data element is recorded based on the learner's eFSM under the current eligility criteria, e.g. that the applicant is in receipt of Universal Credit and are earning below an income threshold of £7,400 per annum or are in receipt of certain legacy benefits during the period in which Universal Credit is being rolled out.

The eFSM data element is used for a multitude of policy and financing purposes, such as calculating Pupil Development Grant (PDG) and local government settlement finances. Therefore, the integrity of the eFSM **must** be retained to ensure that it is only recording the eligibility of the individual learner for free school meals based on the current eligibility criteria (following application and processing the applicant's details through the Eligiblity Checking System (ECS)).

Transitionally protected for free school meals

From 1 April 2019, when the Universal Credit rollout began in Wales, the Welsh Government introduced a new transitional protection (TP) policy to protect those learners that were previously eFSM from falling of the *eligibility cliff*. The policy is intended to protect all learners that have been eFSM under the current eligibility criteria for any period of time between 1 April 2019 and 31 December 2023, often referred to as the *Universal Credit rollout period*. The policy applies to learners for a finite period of time.

A new data element was introduced from 1 April 2019 to record the TP status of learners at an individual level. This was to allow local authorities to re-check the eFSM status of learners at regular intervals, ensuring the integrity of the eFSM can be retained, whilst also allowing the recording of the TP status of learners to enable, at a school level, process to be as burden-free as possible in ensuring learners who are protected are provided with their free school meal.

The collecting of the TP status separate to the eFSM status not only retains the integrity of the eFSM data, but it also allows the Welsh Government to monitor and evaluate the TP policy in terms of eligibility and costs.

Universal eligibility for primary free school meals

The new UPFSM policy aims to provide all primary learners with a universal FSM offer. This means that any learner within the primary phase of education in maintained settings in Wales will be offered a free school meal. This will be independent of the eFSM and TP status data elements.

The solution, on a software system level, requires the recording of the UPFSM status of learners.

However, with it being possible that some parents/guardians and/or learners may choose to not take up or refuse the offer, the software also needs to record whether the learner wishes to take up the UPFSM offer.

2.3 New items added

The UPFSM solution aims to introduce two new data items into MIS software as detailed below.

Universal primary free school meals eligilbity

This will be a new data element to record the UPFSM eligibility of learners. This will be a data element that should be developed into MIS software and **should not** be editable by schools. This data elements should default to a value of **1** (for true) and can be easily calculated, e.g. applied to all learners within the primary phase year groups and/or the year groups being phased in from 1 September 2022.

Universal primary free school meals exemption

This will be a new data element to record any exemption to the new UPFSM eligibility data element above. This will be a data element that should be developed into MIS software and **should** be editable by schools. It should default to **0** (for false), in which case the UPSFM eligilbity status would carry through to partner software supplers.

This data element should be editable by schools so that they can change the value to **1** (for true), which should then intervene the UPFSM eligibility status when transferred to partner software suppliers.

This data element will be changed to **1** (for true) where there are any exemptions to the UPFSM eligibility. Examples of this scenario is, for example, where there may be certain asylum seeker statuses of the individual that will make them ineligible for UPFSM, the school has yet to roll out UPFSM to the relevant year group, and/or where the parents/guardians and/or learner choose to not take up the offer, therby opting to pay for their meals instead, rather than have their child's meal provided at a cost to the school/local authority.

3. Summary of data fields to be returned

The dtaa elements below will be defined in the latest version of **Modular_CBDS_2122.n.n.xls**, which will be available from the SDF area of the DEWi website.

For completeness, the module and and current FSM related data elements are detailed below for context of where the UPFSM data element should sit.

3.1 Individual pupil level data

Pupil characteristics

Field name	Field length	XML tag	Field type	Sample data
Pupil Free School Meal Eligibility	1	<FSMEligible>	Boolean	0
Pupil Free School Meal Transitional Protection Eligibility	1	<FSMTransitionalProtection>	Boolean	0
Universal Primary Free School Meal Eligiblity	1	<UPSFMeligibility>	Boolean	1
Universal Primary Free School Meal Exemption	1	<UPFSMexemption>	Boolean	0

4.   User requirements

A number of default values are recommended, and auto and block fill requirements are requested in order to minimise bureaucratic and administrative burdens in the process of producing accurate UPFSM data.

4.1 Mandatory/optional items

Both of the new data elements should be marked as **M** (mandatory).

4.2 Default values

Where the recommended default values are applied to items they should function as follows:

- <Pupil><NAWPupilCharacteristics><**UPFSMeligible**> should be defaulted to **1** (for true) and should **not** be editable; and
- <Pupil><NAWPupilCharacteristics><**UPFSMexemption**> should be defaulted to **0** (for false) and **should** be editable.

4.3 Block entry

If the default values above are applied upon implementation of the two new data elements, there may not be any need for block entry facilities. However, depending on the rollout phasing of the policy, it may be beneficial to enable block entry facilities, e.g. if rolled out initially to Reception, Year 1 and Year 2, it may be beneficial to enable schools to block fill the data elements for the year groups being phased in.

In addition, for future intakes, depending on how software solutions are implemented there may need to be consideration on whether block entries are required at the beginning of the academic year to reduce burdens, e.g., to block fill the entire new Reception year group cohort as <UPFSMeligible>=**1** and <UPFSMexemption>=**0**. This should allow schools to choose a selection of pupils (e.g. a year group, registration group or class) and specify a value to be applied to all. It should also allow the <UPFSMexemption> data to be edited on an individual basis. The following fields may benefit from this facility, though this is dependent on how MIS software suppliers develop and implement the solution:

- <UPFSMeligible>
- <UPFSMexemption>

4.4 Miscellaneous

Boolean values

The set of allowed values is **1** (where true) and **0** (where false).