



# Fees Free Starter Pack for TEOs

Provider-based study 2023



# Contents

<b>Introduction</b>	<b>2</b>
Getting started	2
<b>Eligibility</b>	<b>3</b>
2023 Learner eligibility criteria	3
2023 Course eligibility criteria	5
Eligibility criteria for other years	5
Eligibility statuses	6
How to check learner eligibility	7
What to do if a learner disagrees with their eligibility status	7
What to do if you have information that challenges a learner’s eligibility status	8
<b>Entitlement</b>	<b>8</b>
What Fees Free covers	8
How carryover works for provider-based study	9
<b>Reporting provider-based study</b>	<b>10</b>
Reporting cycle	10
‘Fees Free All Enrolments and Costs’ template	11
‘Fees Free All Enrolments and Costs Data Validation’ report	11
‘Fees Free Multiple Providers and Cap Limit’ report	12
Single Data Return and Fees Free	12
Data resubmissions for previous years	13
<b>Allocations and payments</b>	<b>13</b>
<b>Advising learners</b>	<b>14</b>
How learners can check their eligibility	14
Statutory declarations	14
Marketing Toolkit	15
<b>More information</b>	<b>15</b>
Information guides and newsletters	15
COVID-19 and Fees Free	16
Privacy	16
Frequently asked questions	17
Glossary	18
<b>Appendix</b>	<b>19</b>

# Introduction

Fees Free Tertiary Education and Training was introduced on 1 January 2018 for first-time tertiary students or trainees in their first year of provider-based study, or first two years of work-based learning.

The policy supports the Government's commitment to make tertiary education and training affordable for all by:

- a. improving affordability and reducing debt levels;
- b. expanding access and participation, especially for those who have not previously studied or those for whom finance has been a real barrier to participation;
- c. supporting lifelong learning;
- d. ensuring the benefits of tertiary education for New Zealanders, including residents with an ongoing commitment to New Zealand, are shared through a highly skilled population contributing to a strong society and thriving economy.

**As a tertiary education organisation**, you have a part to play in ensuring your eligible learners can access their Fees Free entitlement while enrolled at your organisation. You'll need to:

- **check the Fees Free eligibility** of your enrolled learners,
- **report eligible learners** who are enrolled in eligible courses to us each month,
- **accept payments** made to you from TEC on behalf of eligible learners, and
- **support your learners** in understanding their **eligibility** and **entitlement** to Fees Free.

This guide is to help you understand the Fees Free policy and to aid you in supporting your Fees Free eligible learners by covering the key points of the process and showing you where to find further information.

If you need any additional support at any time, please contact your Relationship Manager or the Customer Contact Group at [customerservice@tec.govt.nz](mailto:customerservice@tec.govt.nz) or 0800 601 301.

## Getting started

To get started, there are a few things you should check.

### Has your organisation signed your Fees Free agreement?

You will receive annual Fees Free agreements from the TEC. Our Fees Free agreements are uploaded to Workspace 2, and the lead contact for your organisation will need to sign this and return it to us before we can make any payments for the calendar year.

If you do not have a Fees Free agreement on Workspace 2, **contact us** for assistance.

### Do we have your contact details?

If you will be filling in Fees Free reports for your organisation, please **contact us** to confirm that we have added you as a Data Return contact for your organisation, to ensure you receive any communications we send about Fees Free.

We also encourage you to **sign up for our monthly newsletter**, 'Fees Free Focus', which keeps you up to date with any important changes, and provides helpful tips for Fees Free reporting.

# Eligibility

To receive Fees Free, a learner must meet the **learner eligibility criteria** for Fees Free, and must be enrolled in an **eligible course or programme**.

We (the TEC) determine the **Fees Free eligibility status** of each learner. You'll need to **check the eligibility statuses** of learners enrolled at your organisation, and **report the eligible enrolments** to us.

## 2023 Learner eligibility criteria

The following is the eligibility criteria for the 2023 calendar year. Learners starting their study in 2023 must meet this criteria to be eligible for Fees Free. For provider-based study, there are residency criteria and prior study and training criteria.

### Learner residency criteria

To be eligible for Fees Free in **provider-based** tertiary education in 2023, a learner must be one of the following:

1. a New Zealand citizen, or
2. a holder of a residence class visa and:
  - a. have been living in New Zealand for at least 3 years while holding a residence class visa and ordinarily resident in New Zealand; or
  - b. a person granted refugee or protected person status, or a family member granted a residence visa with the person granted refugee or protected person status; or
  - c. sponsored into New Zealand by someone in their family who, at the time of sponsorship, was a refugee or protected person; or
3. a person granted refugee or protected person status prior to gaining a residence visa; or
4. an immediate family member, without a residence visa and residing in New Zealand, of a person granted refugee or protected person status, as defined as:
  - a. the partner and any child in New Zealand, of a person granted refugee or protected person status prior to gaining a residence visa; or
  - b. the parent and any sibling in New Zealand, of a person granted refugee or protected person status prior to gaining a residence visa, who is a dependent child; or
5. a holder of the Christchurch Response (2019) Permanent Resident Visa; or
6. a holder of a residence class visa who would have been eligible for the Christchurch Response (2019) Permanent Resident Visa; or
7. a holder of a residence class visa who is a family member of a Christchurch Response (2019) Permanent Resident Visa holder, or a family member of a residence class visa holder who would have been eligible for the Christchurch Response (2019) Permanent Resident Visa; or
8. a holder of the Afghan Emergency Resettlement Resident Visa.

## Learner prior study and training criteria

To be eligible for Fees Free for **provider-based** tertiary education, a learner must also have either:

- a. been enrolled in a school in or after 2021 other than as an adult learner; or
- b. not undertaken more than half a year of equivalent full-time tertiary education (0.5 equivalent full-time student (EFTS) units or 60 credits) at Level 3 or above on the New Zealand Qualifications and Credentials Framework (NZQCF), including tertiary education at an equivalent level undertaken in any country.

The following credits must not be included in measures of prior tertiary education to determine eligibility for Fees Free:

- a. any tertiary education undertaken while enrolled in school prior to 1 January 2019 (except for tertiary education undertaken as an adult student); and
- b. any tertiary courses undertaken as part of the learner's school learning programme or secondary-tertiary programme on or after 1 January 2019; and
- c. any credits achieved as part of any industry training programme that consists of fewer than 120 credits that are reported after 1 January 2018.
- d. any courses or credentials funded by the TEC undertaken after 1 January 2023 that had zero tuition fees and zero compulsory course costs.
- e. Tertiary education undertaken as part of the **Targeted Training and Apprenticeships Fund (TTAF)**.
- f. Tertiary education undertaken through the **Youth Guarantee** programme after 1 July 2020.
- g. Tertiary education undertaken through the **Māori and Pasifika Trades Training** programme after 1 July 2020.
- h. Tertiary education undertaken through the **Refugee English Fund**.

Learn more about prior study and training [here](#).

## 2023 Course eligibility criteria

The following is the eligibility criteria for the 2023 calendar year. Courses starting in 2023 must meet this criteria to be eligible for Fees Free. You will only be asked to report enrolments in courses that meet these criteria.

### Course eligibility criteria

An eligible course for provider-based tertiary education is a course that is:

- a. funded by the TEC from either:
  - i. the Non-Degree Delivery at Levels 3-7 on the New Zealand Qualifications and Credentials Framework and all Industry Training (DQ3-7) fund, but excludes provision that would previously have been funded through the Industry Training Fund, or
  - ii. the Delivery on the New Zealand Qualifications and Credentials Framework at Levels 7 (Degree) and above (DQ7+) fund, or
  - iii. grants under section S556 of the Education and Training Act 2020 for tertiary provision towards a qualification on the New Zealand Qualifications and Credentials Framework (NZQCF) at level 3 or above, or a micro-credential at level 3 or above approved by the New Zealand Qualifications Authority (NZQA), and
- b. not part of a school learning programme or secondary-tertiary programme.

Some courses are not covered under Fees Free where the fees are already met under another TEC funding arrangement, such as Māori and Pasifika Trades Training, or the Refugee English Fund.

Courses paid for by employers, and courses paid for through a scholarship are eligible for Fees Free if they meet the criteria above, and should be included in Fees Free reporting as eligible courses.

## Eligibility criteria for other years

Since Fees Free started, there have been several changes to both the learner eligibility criteria, and the course eligibility criteria. It's important to look at the criteria for the calendar year in which the learner started their eligible study or training.

If you're interested in finding out about the Fees Free eligibility criteria for a previous year, **contact us** and we'll help you out.

## Eligibility statuses

A learner can be given a number of different eligibility statuses. A learner can have different statuses for provider-based study and work-based learning, as well as for different years.

Status	Code	Meaning
No	N	The learner does not meet the eligibility criteria and cannot receive Fees Free. Learners can query this status by asking us for a review, and can then appeal if they disagree with the information we hold.
Unknown	U	Also known as 'Maybe'. The TEC does not have enough information to determine the learner's eligibility status. The learner should check the eligibility criteria and, if they meet the criteria, they can submit a <b>statutory declaration</b> to the TEC to confirm that they are eligible.
Yes	Y	The learner meets the <b>learner eligibility criteria</b> for Fees Free. Either the TEC had enough information to automatically make the learner eligible, or the learner has submitted a statutory declaration which has been used to change their status to Yes. Eligible learners need to be reported to the TEC when they enrol in eligible study.
2018 Starter	8	The learner is eligible for Fees Free, and started to use their Fees Free entitlement in 2018. This is considered an eligible status, because the learner may still have entitlement remaining. Eligible learners that have remaining entitlement need to be reported to the TEC when they enrol in eligible study.
2019 Starter	9	The learner is eligible for Fees Free, and started to use their Fees Free entitlement in 2019. This is considered an eligible status, because the learner may still have entitlement remaining. Eligible learners that have remaining entitlement need to be reported to the TEC when they enrol in eligible study.
2020 Starter	0	The learner is eligible for Fees Free, and started to use their Fees Free entitlement in 2020. This is considered an eligible status, because the learner may still have entitlement remaining. Eligible learners that have remaining entitlement need to be reported to the TEC when they enrol in eligible study.
2021 Starter	1	The learner is eligible for Fees Free, and started to use their Fees Free entitlement in 2021. This is considered an eligible status, because the learner may still have entitlement remaining. Eligible learners that have remaining entitlement need to be reported to the TEC when they enrol in eligible study.
2022 Starter	2	The learner is eligible for Fees Free, and started to use their Fees Free entitlement in 2022. This is considered an eligible status, because the learner may still have entitlement remaining. Eligible learners that have remaining entitlement need to be reported to the TEC when they enrol in eligible study.

## How to check learner eligibility

Eligibility statuses can change daily based on statutory declarations, eligibility appeals, and other information submitted to the TEC. It's important to check the eligibility status of your learners regularly, so that you can **report the eligible enrolments to us**.

There are several ways for you to check the eligibility status of your learners.

### Fees Free website

The **Fees Free website**, while predominantly used by learners, can be used by tertiary education organisations to check the eligibility of a learner. The website is updated daily.

### Workspace 2

On the home page of Workspace 2 there is a 'Shared Documents' section. Here, you'll find several *Fees Free Eligibility* CSV files that list all eligible learners (those with a 'Yes' or 'Starter' status) that have remaining Fees Free entitlement, for each calendar year. These are the learners you will need to report for Fees Free. If a learner is not on this list then they are either ineligible for Fees Free, their status is 'Unknown', or the learner is eligible but has already used their full entitlement in a previous year.

There is a different file for each calendar year. Please check a learner's eligibility status for the year they started their study or training.

All files are updated daily.

### Email

For large volumes of learners, you may wish to send a CSV file to **customerservice@tec.govt.nz** containing a list of National Student Numbers (NSNs) enrolled with your organisation in the current calendar year. We'll return this file to you with the learners' eligibility statuses within two business days.

This file will allow us to give you the status of every learner enrolled with your organisation, regardless of whether the learner is eligible or not.

## What to do if a learner disagrees with their eligibility status

Learners with a 'No' status who want to understand why they are ineligible can request a review of their eligibility. They can do this by entering their NSN and filling out the web-form on the **Fees Free website**. If they believe they meet the Fees Free eligibility criteria and disagree with the information TEC holds, they are able to appeal their eligibility. We will assess the evidence they provide and may change their eligibility status if their appeal is approved.



## What to do if you have information that challenges a learner's eligibility status

In accordance with our Fees Free agreement, you must immediately notify us if you become aware of information that indicates that an eligible student should not have been determined by us to be eligible. The 'Fees Free TEO Change Learner Eligibility Status' report is available to you on Workspace 2 to submit these learners for review. You can do this at any time.

We will reassess the learner's eligibility based on the evidence you provide. If we are unable to reach a decision we may contact you for additional information or request copies of certificates for an in-depth assessment.

If we have determined that a learner does not meet the eligibility criteria for Fees Free we will notify the learner and advise that they may now be charged by their tertiary education organisation as their eligibility has been overturned. You will also be informed of the outcome by an email addressed to the contact you specify in the report.

## Entitlement

A learner's entitlement is the amount of Fees Free they have available to them, once we've determined that they are eligible. The TEC will keep track of a learner's entitlement use, and let you know how much of each learner's fees we can cover via the **monthly reporting process**.

### What Fees Free covers

In a learner's first calendar year of study they can get up to \$12,000 (including GST) for any **Fees Free eligible study**. There is no equivalent full-time student (EFTS) or credit cap in the first calendar year. Learners who undertake less than 1 EFTS and use less than \$12,000 of Fees Free in their first calendar year of study can carry over their remaining Fees Free entitlement (in dollars and EFTS) into the following calendar year. See more information on how carryover works for Fees Free study [here](#).

Learners can be enrolled in multiple programmes, qualifications, or tertiary education organisations while using their Fees Free entitlement. A learner using their entitlement in both provider-based study and work-based learning will use their entitlement in months, as well as EFTS and dollars.

Not all fees are covered by Fees Free, though most compulsory fees are. For eligible provider-based study, Fees Free covers:

- compulsory tuition fees
- compulsory course costs that are charged to all students enrolled in a course, which includes (but are not limited to) the following:
  - any compulsory costs associated with an enrolment;
  - examinations (including reporting of credits to the NZQA);
  - field trips; and
  - any compulsory purchase of equipment or books through the TEO; and
- student services fees.

Learners will need to cover any administrative fees or charges for additional services that are payable as a result of their specific circumstances, such as student association and club memberships, late fees, reassessment of exam results, examination relocation fees, and fees associated with recognition of prior learning.

This aligns Fees Free coverage with current fee regulation and courses currently covered by the Student Loan Scheme.

### How carryover works for provider-based study

There is no equivalent full-time student (EFTS) or credit cap in a learner's first year of provider-based study. At the end of each calendar year, we'll assess how much Fees Free each learner has used and determine whether they have remaining entitlement to carry over into future calendar years.

This is so learners who start their study part way through the year or study part time are not disadvantaged and can still receive a full year Fees Free.

A learner must have undertaken less than 1 EFTS (120 credits) and used less than \$12,000 of Fees Free in their first calendar year of study to continue to receive Fees Free in the following year. Once they have used 1 EFTS or \$12,000 (including GST), their entitlement stops.

### Calculating carryover entitlement

When entitlement runs across more than one calendar year it is calculated in both dollars and EFTS. The learner's Fees Free entitlement is limited to the lesser of \$12,000 or 1 EFTS, so we must monitor and recalculate the learner's entitlement use to determine the correct Fees Free allocation to be paid to the tertiary education organisation (TEO).

We do this by determining the average dollar per EFTS rate for the learner (by each TEO), plus validated student services fees. You can read more about this calculation [here](#).

We'll let you know when a learner has used their full entitlement in the **'Multiple Providers and Cap Limit report'**.

## Reporting provider-based study

As with other funds, you're required to report your **Fees Free eligible enrolments** to us so that we can monitor **Fees Free entitlement use**, and calculate the allocation due to you for each of your enrolled learners.

Fees Free reporting is completed on a monthly cycle.

### Reporting cycle

Each month, we will provide you with a blank '**Fees Free All Enrolments and Costs**' template on Workspace 2, which you will use to report all of your eligible Fees Free enrolments to us to date for the calendar year.

Templates are provided to you on the second Wednesday of each month, and are due back to us on the third Wednesday. In months when a Single Data Return (SDR) is also due, reporting remains open for an additional week. It's important that you submit your Fees Free returns on time, as we need to wait for all returns to be submitted before we can start processing them, to correctly allocate for learners enrolled at multiple tertiary education organisations.

The dates of each round are available on the **TEC business calendar**, and are also included in the monthly Fees Free newsletter, 'Fees Free Focus'.

An email will be sent to the lead contact and the data return contacts for each organisation at the beginning of each reporting round.

When you submit your returns to us, we will validate the information and provide you with a couple of reports in return. These reports inform you of any errors we have found in your return ('**Fees Free All Enrolments and Costs Data Validation**' report) and tell you how much we intend to allocate to you for each learner you have reported to us ('**Fees Free Multiple Providers and Cap Limit**' report).



## ‘Fees Free All Enrolments and Costs’ template

The ‘Fees Free All Enrolments and Costs’ return is used to monitor the Fees Free entitlement use of your learners, and to calculate the payments due to you for those learners. We’ll provide the ‘Fees Free All Enrolments and Costs’ template to you each month for you to fill in. On this template you need to include all of your eligible enrolments and the fees associated with those enrolments, including any student services fees charged to those learners, for the calendar year to date. See **Figure 1 in the Appendix** for an example of the information required.

This report is **cumulative**, so we expect the report to increase in size each month as you enrol additional learners throughout the year. Any changes to enrolments need to be updated in the following month’s return, and your December return should be a complete and accurate report of all Fees Free eligible enrolments for the year.

The fees that you enter in the ‘Fees Free All Enrolments and Costs’ return are the fees that you are charging the learner for their enrolments. We ask you to report the tuition fees, the compulsory course costs, and the student services fees for each learner, as well as the EFTS they are using, and other information about their enrolments.

Note that the fees you charge eligible learners must be the same as the fees that you charge every learner in the same circumstances (whether or not they are eligible for Fees Free) who is enrolled in the same course.

There is a guide available on the **TEC website** to help you fill in this return. If you have any questions or need help filling in your report, please do not hesitate to contact your Relationship Manager or the **Customer Contact Group** for assistance.

### Need help with Workspace 2?

You can find information and helpful Workspace 2 resources on the **TEC website**.

## ‘Fees Free All Enrolments and Costs Data Validation’ report

After we have received your ‘Fees Free All Enrolments and Costs’ report, we will validate the information and upload a ‘Fees Free All Enrolments and Costs Data Validation’ report to Workspace 2. See **Figure 2 in the Appendix** for an example of the report.

This report identifies any errors in your ‘Fees Free All Enrolments and Costs’ submission.

Common examples of errors are:

- fees or EFTS that exceed the amount approved for the course in Services For Tertiary Education Organisations (STEO)
- course or qualification codes that cannot be found in STEO
- GST calculation errors
- incorrect source of funding code on student withdrawals.

We can’t allocate fees to you for enrolments that have errors, so we ask that you check your Data Validation report every month and correct any errors on your following month’s ‘Fees Free All Enrolments and Costs’ return.

We’ll email the lead contact and data return contact(s) for your organisation when this report is uploaded to Workspace 2. A guide to help you read and understand this report is available on the **TEC website**. If you need help identifying the cause for any of your errors, let us know.

## ‘Fees Free Multiple Providers and Cap Limit’ report

After we have validated the data you have submitted, we will determine the amount each learner can be allocated for the courses that you have reported.

When calculating this, we must take into account:

- learner eligibility
- the amount of Fees Free study or training each learner has undertaken in a previous year
- any study or training each learner is enrolled in with another organisation in the current year
- any errors in the ‘Fees Free All Enrolments and Costs’ returns
- other factors which impact learner entitlement use, such as entitlement use appeals.

Learners who are **in carryover** (have used entitlement across multiple calendar years) must be calculated using the average EFTS value of the enrolments reported to us.

Once the allocations are calculated, we’ll give you a ‘Fees Free Multiple Providers and Cap Limit’ report. See **Figure 3 in the Appendix** for an example of the report. The report tells you what we intend to allocate to you for each learner for the calendar year to date, based on the information you have submitted to us that month. You can use this to calculate any additional amount that you may need to charge the learner.

We’ll send the lead contact and data return contact(s) for your organisation an email when this report is uploaded to Workspace 2. A guide to help you read and understand this report is available on the **TEC website**.

A learner’s allocation is not finalised until the end of the calendar year, and we do expect changes to this amount throughout the year depending on the factors listed above.

You may invoice eligible learners for fees at any time. However, you cannot require the eligible learner to pay the fees unless we have notified you that the learner does not have carryover entitlement, or have confirmed the amount we will pay on behalf of the eligible learner. If you are sending invoices to learners who are likely to have part or all of their fees covered by Fees Free, we ask that you advise your learners that the amount is not final.

## Single Data Return and Fees Free

The enrolment information you report in your Single Data Return (SDR) and in your Fees Free returns must match, including qualification and course codes, start and end dates, source of funding codes, and EFTS.

After you submit your August SDR, we will reconcile it against your most recent Fees Free return and provide you with a list of mismatched data and learners that have not been included in both reports. This is used as a reminder to make sure the two reports are aligned in time for the end of year wash-up.

While validating your end of year Fees Free reports, we will also complete a reconciliation against your December SDR. This is to check that all enrolments in your final Fees Free report are also in your SDR. **Enrolments that are not in your SDR cannot be covered in your final Fees Free allocation** as we cannot confirm the funded enrolment.

## Data resubmissions for previous years

It's important that you report all of your eligible learner enrolments to us as soon as you receive them, and that you actively work to correct any errors that you find during the year. However, if you do identify any errors or learners that have been excluded from a previous year's report, please let us know. We may give you the opportunity to resubmit your report and change your final allocation.

We may also ask you to resubmit a report if a learner's eligibility status has changed retrospectively (for example, due to a statutory declaration submission or an appeal). If this occurs, please make the changes quickly so that we can organise fee payment for the learner in a timely manner. When you receive payment for a learner's fees, you must refund any fees already paid by the learner (directly, or via StudyLink) as soon as possible.

## Allocations and payments

Most Fees Free payments are pre-determined based on the estimated Fees Free enrolments for the calendar year. We use the enrolment information from prior years to help us determine the allocation for each TEO for the calendar year, and then create a payment schedule based on that allocation.

### Payment schedules

Most tertiary education organisations will receive a payment schedule which they can access on the My Allocations and Payments app through **Ngā Kete**. Payments are intended to mimic learner enrolments throughout the year, usually with a larger payment up front, followed by smaller regular payments afterwards.

Adjustment payments will be made in-year as required, if reported delivery is trending higher or lower than your allocation for the calendar year. We will assess your reported delivery each month, and we'll contact you if we need to make an adjustment to your allocation. You may also ask us to review your allocation at any time.

### Zero-based allocations

There are some tertiary education organisations for which we do not have enough historical data to make an accurate estimate of Fees Free enrolments for the calendar year. This can include organisations new to delivering Fees Free, as well as organisations that have had inconsistent enrolments in the past.

Organisations with a zero-based allocation will not receive a payment schedule. Instead, in-year adjustment payments will be made throughout the year as required based on reported delivery. We will consider your reported delivery each month, and contact you if we need to make an adjustment to your allocation. You may also ask us to review your allocation at any time.

## Wash-ups

Because Fees Free delivery can fluctuate a lot month to month due to changes to learner enrolments, eligibility, and reporting errors, we do not expect payments received to match the actual delivery until the final wash-up at the end of the year.

At the end of each year, after the final reports have been validated, we'll complete a wash-up of all Fees Free allocations and make a final payment or recovery, so that your final allocation matches your delivery for the year.

# Advising learners

Learners can find information about Fees Free by visiting the **Fees Free website**, or by contacting us at [customerservice@tec.govt.nz](mailto:customerservice@tec.govt.nz) or 0800 601 301. Learners may also come to you for help understanding Fees Free.

## How learners can check their eligibility

Learners should check their eligibility for Fees Free by entering their NSN on the NSN checker on the **Fees Free website**, or through the NZQA website.

If the eligibility of a learner is 'Unknown', you must advise the learner that, to receive Fees Free, they must check their eligibility using the **Fees Free website's online tool**. Even if they know they meet the eligibility criteria, they still need to check their status as there may be steps they need to complete to inform us.

## Statutory declarations

When we do not have enough information available to determine a learner's eligibility status, the learner's status will be 'Unknown' (also known as 'Maybe'). If the learner determines that they meet the eligibility criteria for Fees Free, they can complete a statutory declaration by following the steps on the website, and send it to us at [feesfreecheck@tec.govt.nz](mailto:feesfreecheck@tec.govt.nz). We'll process the statutory declaration and change the learner's status to 'Yes' based on the information provided in their statutory declaration. We may change a learner's eligibility status if we become aware of other information relating to their eligibility, or if we determine that the information we relied on is incorrect.

**It is important that learners do not complete a statutory declaration if they don't meet the eligibility criteria.** A statutory declaration is a legal document. It is an offence under the Education and Training Act 2020 and Crimes Act 1961 to give any altered, false, incomplete or misleading information or to make a false statement or declaration. If a learner needs help determining whether or not they meet the criteria, they should contact us at [customerservice@tec.govt.nz](mailto:customerservice@tec.govt.nz) or 0800 601 301 before generating a statutory declaration.

Learners with an 'Unknown' status are not considered eligible for Fees Free, and we cannot cover their fees while they have this status. However, the status can change at any time. If a learner becomes eligible for Fees Free by declaring their eligibility during the year, we'll still cover their fees for the full calendar year, or from when they met the criteria (i.e. when a learner meets the residency criteria part-way through the year), whichever is latest.

Once processed, we'll update the learner's status on the Fees Free website, as well as in the eligibility files on Workspace 2 for TEOs. Learners are not expected to let their TEO know once their status has changed to 'Yes', as TEOs are informed through these avenues.

There is a section about statutory declarations in the Frequently Asked Questions page on the Fees Free website [here](#).

## Marketing Toolkit

We've created a Marketing Toolkit to support you in encouraging learners to check their Fees Free eligibility at [feesfree.govt.nz](https://feesfree.govt.nz). The toolkit includes:

- website copy for Tertiary Education Organisations.
- Fees Free **quick learner guide** that you can share with learners.
- social media copy for your own channels.
- links to our social media advertisements that you can share.
- video assets that you can share.
- Fees Free logos.

We have also included some messaging to support your communication about Fees Free and the end of the Targeted Training and Apprenticeship Fund.

Check out the Fees Free Marketing Toolkit on the [TEC website](#).

## More information

The TEC website ([tec.govt.nz](https://tec.govt.nz)) and the Fees Free website ([feesfree.govt.nz](https://feesfree.govt.nz)) are both useful tools for finding information relating to Fees Free. If you're unable to find something that you need, please [contact us](#).

## Information guides and newsletters

Some information guides have been published on the [TEC website](#) which cover particular topics, such as the methodology for calculating Fees Free learner carry-over entitlement, and how Fees Free is applied to aviation provision. New guides are added as needed.

Remember to [sign up to our monthly newsletter, 'Fees Free Focus'](#), to receive updates, reporting tips, and the reporting schedule. Recent Fees Free newsletters can be found [here](#).



## COVID-19 and Fees Free

Many learners have been adversely affected by COVID-19 either by not being able to participate fully in their studies or training, or due to illness or financial hardship. This has resulted in some learners withdrawing from their study or training or not completing courses.

We have automatically applied a rule to all study and training where a withdrawal occurred between **23 March and 30 June 2020** or **between 17 August and 31 December 2021**, referred to as the COVID-19 Blanket Withdrawal Periods.

For learners enrolled in provider-based study during this time, this effectively reinstated the learner's full or partial entitlement (EFTS and dollars) to Fees Free by discounting the courses the learner withdrew from within these periods. We still covered the fees for these courses (up to their cap).

Learners who did not withdraw from their study or training within the COVID-19 Blanket Withdrawal Periods, but feel that their ability to participate in their study or training was affected by COVID-19, can ask us to review their entitlement use by entering their NSN and filling out the web-form on the **Fees Free website**.

## Privacy

Our Privacy Notice can be found **here**. It outlines how the TEC protects and manages all personal information we hold.

We can release learner Fees Free information to you as their TEO using the clause in the Privacy Act which refers to 'directly related purpose'. The clause means we can provide information to TEOs on Fees Free learners without the learner's direct consent, as long as the purpose meets the Privacy Act requirements and is consistent with our purposes for collecting the information.

We will have to verify the person we are speaking with on the phone, or by email, is a direct TEO employee before we can share information. Make sure you are aware of your EDUMIS/ Provider number, and use your TEO email, not a personal one. If we are unable to verify that you work for the TEO we must uphold the Act and not provide the learner's information.

The following outlines information that we will be able to share without express learner consent, as this is linked to the Privacy Act and 'directly related purpose':

- learner's consumption – in order for the provisions of the Fees Free agreement to be met the TEC must have the ability to advise a TEO of a learner's consumption of Fees Free entitlement
- learner eligibility – in accordance with your funding conditions, fees cannot be charged to a student if the TEC advises that it will pay fees on behalf of that student.

Please send any requests for information in the above scenarios to **customerservice@tec.govt.nz**, or phone 0800 601 301.

## Frequently asked questions

### How do I contact the TEC?

For general enquiries, the Customer Contact Group is your first point of contact. We are available from 8.30am to 5pm on weekdays, except Wednesdays, when we are available from 9.30am to 5pm.

Phone: 0800 601 301 or +64 4 462 5201

Email: [customerservice@tec.govt.nz](mailto:customerservice@tec.govt.nz)

You can also contact your dedicated Relationship Manager or Advisor. If you're not sure who your Relationship Manager and/or Advisor is, contact the Customer Contact Group for assistance.

### What are the dates for the reporting rounds?

The dates for the reporting rounds can be found on the **TEC Business Calendar**. We will also provide the dates for the upcoming month in the 'Fees Free Focus' newsletter.

### What do I do if a learner does not have a National Student Number (NSN)?

A National Student Number (NSN) is the education sector's unique identifier. A learner will need an NSN to enrol with your organisation, and you will need to use their NSN to report the learner's fees to us.

Funded tertiary education organisations have the ability to issue an NSN to any learner through the National Student Index (NSI). Learn more about the National Student Index and how to access it [here](#).

### Can I ask for additional Fees Free allocation?

We'll assess your reported delivery against your allocation each month, and let you know if we need to make adjustments to your allocation. This assessment is evidence-based, so we'll consider the consistency of the delivery you report over several months before making an adjustment. You can also request an assessment at any time by contacting the Customer Contact Group.

### Why have you not allocated Fees Free for a learner's fees to us?

There are a number of things that would prevent us from allocating Fees Free to you for some or all of a learner's fees. The most common reasons are:

- The learner has used their full entitlement already and is not able to receive further Fees Free.
- The learner is enrolled with another tertiary education organisation and does not have enough entitlement remaining to cover all enrolments at both organisations.
- There are errors in your reporting. We cannot allocate for enrolments/fees that do not pass validation, so it's important to check for errors each month, and correct these in your report the following month.

We will inform you of these reasons in the '**Multiple Providers and Cap Limit**' report we return to you each month. If you need help identifying why we haven't covered fees, let us know and we'll be happy to help.

### How do I fix a Fees Free report I have already submitted?

If you've discovered an error on a report you've just submitted, and the reporting deadline for that month has not yet passed, you can ask us to set the report to 'Revise' in Workspace 2. This means you can make further changes to your report and submit it again before the deadline.

If the deadline has already passed, you won't be able to make changes and will need to amend any errors on your report the following month. Once it's available to you, you can use your **'All Enrolments and Costs Data Validation'** report to help you identify any errors you may have.

### Do I need to report courses that already have zero fees?

From 1 January 2023, courses that have no tuition fees and no compulsory course costs for all learners enrolled in the course will not use a learner's Fees Free entitlement. This means that you do not need to report these in your Fees Free returns.

This does not include courses that have fees, but the fees were paid by a scholarships, student loan, employer, or other zero fees scheme, courses that the learner has withdrawn from and been granted a fee refund (unless full EFTS are also removed from the learner's record), and courses that have zero tuition fees but did have compulsory course costs associated with the course.

You should ensure that the course has zero tuition fees and zero compulsory course costs recorded against the course in Services for Tertiary Education Organisations (STEO).

You can find more information about zero fee courses on the **TEC website**.

### How do I report learner withdrawals?

If a learner has withdrawn from a course within the refund deadline with full EFTS and fee refund, you do not need to report the enrolment to us, as the learner is not using any entitlement.

If a learner has withdrawn from a course and you are retaining some EFTS and/or fees, you do need to report the enrolment to us. Make sure to include the enrolment in your next return with the updated fees you are charging the learner, and the updated EFTS they have used. You may also need to adjust the source of funding code you are using for the learner.

You can find further information on reporting learner withdrawals in the **'Fees Free All Enrolments and Costs' guide**.

### How does Fees Free interact with other funds that cover learner fees?

There are a few other funds that also cover learner fees such as Youth Guarantee (YG), Māori and Pasifika Trades Training (MPTT), the Refugee English Fund, and the Targeted Training and Apprenticeships Fund (TTAF). It's important to understand how these funds work alongside Fees Free. In 2023 most of the courses funded through another funding arrangement are not eligible for Fees Free, and don't count as part of a learner's entitlement use.

The rules for these fund interactions can be found **here**, along with reporting requirements and other frequently asked questions.

## Glossary

You can find a glossary of terms on the TEC website **here**.

## Appendix

Figure 1: Example of 'Fees Free All Enrolments and Costs' template filled in by a provider using sample NSN 123456789

National Student Number	Non-Standard Fee	Qualification Code	Course Code	Course Start Date	Course End Date	Student Course Withdrawal Date	Course EFTS factor	Source of Funding	Course Tuition Fee (GST Exclusive \$)	GST Charged on the Course Tuition Fee	Compulsory Course Costs Fee (GST Exclusive \$)	GST Charged on the Compulsory Course Costs Fee	Fee Code	Fee Description	Compulsory Student Services Fee	Student Services Fee (GST Exclusive \$)	GST Charged on the Student Services Fee
123456789	No	ABC123	XYZ123	1/03/2023	30/06/2023		0.1250	01	434.78	65.22	86.96	13.04					
123456789	No	ABC123	XYZ456	1/07/2023	25/11/2023	14/09/2023	0.1447	01	521.74	78.26	86.96	13.04					
123456789	No	ABC123		1/03/2023	25/11/2023								SSF-1	Student Services Fee 1	Yes	13.04	1.96

Figure 2: Example of 'Fees Free All Enrolments and Costs Data Validation' report completed by TEC using sample NSN 123456789

Eligible National Student Number	Eligible Source of Funding	Eligible Qualification Code	Eligible Course Code	Course Tuition Fee AND Compulsory Course Costs Compared to STEO	Course Tuition Fee GST Calculation	Compulsory Course Costs GST Calculation	Student Services Fee GST Calculation	Course EFTS Factor Compared to STEO	Eligible Compulsory Student Services Fee	Eligible From Date	Comments1	Comments2	Data Validation ID
Yes	Yes	Yes	Error	Error	Yes	Yes		Error	Yes	2023-01-01		Exclude	00000001
Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	2023-01-01			00000002
Yes		Yes					Yes		Yes	2023-01-01			00000003

Figure 3: Example of 'Fees Free Multiple Providers and Cap Limit' report completed by TEC using sample NSN 123456789

National Student Number	Student Enrolled with Multiple Providers in 2023	Fee Allocation Required	All Fees Reported by You Including GST	2023 Fees Free Allocation Including GST	Comments
123456789	No	Validation Errors Identified	\$ 1,315.00	\$ 715.00	The data you submitted contains one or more validation errors for some of the rows submitted for this Learner and is unable to be allocated the full fees you have reported. Please check your Data Validation report.

**Published by the Tertiary Education Commission  
Te Amorangi Mātauranga Matua**

**National Office**

44 The Terrace  
PO Box 27408  
Wellington, New Zealand

**January 2023**



**Tertiary Education  
Commission**  
Te Amorangi Mātauranga Matua

