



Kia ora!

Welcome to the Fees Free newsletter for November, with tips to help make implementing fees-free easier for you, and easier for your learners accessing the policy. Please encourage all those working to implement fees-free in your organisation to subscribe and receive updates directly.

[Click here to subscribe](#)

Programme update

It's been two weeks since Fees Free 2019 went live! If you haven't already yet, check out the refreshed [Fees Free](#) website and new [Fees Free Facebook](#) page.

We're continuing to prepare for 2019; reviewing our current processes, setting up new processes where required and ensuring all information is up to date. We'll keep you up to date, through this newsletter, about any new updates to the Fees Free or TEC websites.

Claiming retrospective fees-free support (payments)

In previous newsletters we've noted that learners with an 'unknown' eligibility status should check the eligibility criteria and, if they meet the criteria, submit a statutory declaration form as soon as possible.

We can now confirm that learners must claim fees-free support in the calendar year that their course or industry training programme starts.

If a learner with an 'unknown' eligibility status starts an eligible course or industry training programme in the 2018 calendar year, they must complete and submit a statutory declaration form **prior to 31 December 2018** to receive fees-free support for the study or training. If the form hasn't been processed by 31 December, that's okay. The form just needs to have been submitted by 31 December.

If they don't, any eligible study or training undertaken in 2018 will count for consumption but the learner won't be entitled to have fees-free support for this study or training.

For example, if a learner with an 'unknown' eligibility status undertook 0.5 equivalent full-time student

(EFTS) at a cost of \$3,000 in the 2018 calendar year and they didn't submit a statutory declaration in 2018, the learner will still be considered to have consumed 0.5 EFTS and \$3,000 of fees-free support.

Even if a learner doesn't claim fees-free support and they are later determined to be eligible, they may still be able to carry-over some remaining fees-free entitlement.

This will depend on how many EFTS and dollars they consumed in the 2018 calendar year. Some learners may be entitled to carry-over some entitlement into 2019.

For provider-based study, learners who **undertake less than 1 EFTS (120 credits) and use less than \$12,000 (including GST) of fees-free support** in the 2018 calendar year, can carry-over their residual fees-free entitlement (in dollars and EFTS).

See [Carryover settings for 2019](#) for more information on carry-over.

An info sheet is available on the TEC website which includes more detailed information about [claiming retrospective fees-free support \(payments\)](#).

Communicating this with learners

We encourage you to remind all learners with an 'unknown' eligibility status who have been, or are currently, enrolled at your organisation to complete and submit a statutory declaration form prior to 31 December.

We'll be contacting you if you have learners who were, or are currently, enrolled at your organisation that we've identified may be eligible based on the August Single Data Return (SDR).

2018 Starter status and carry-over

Eligible learners who started studying or training in 2018 will receive a **2018 Starter** result if they check their eligibility for 2019 on the Fees Free website. This result indicates that the learner has used some fees-free entitlement in 2018. It does **not** tell the learner whether or not they will be entitled to carry-over some fees-free entitlement into 2019 (or future years).

2018 Starters are shown in fees-free reports as '**8**' (as opposed to Y, U or N). A learner with the status '8' has consumed some fees-free entitlement in 2018 and *may* still have some fees-free entitlement left to use in 2019 (or future years). You may have noticed that the format of these reports is not the same as the format described on Workspace 2, this will be corrected in the next few days.

For providers, a 2018 Starter will have some fees-free entitlement to carry-over if the learner has **undertaken less than 1 EFTS (120 credits) and used less than \$12,000 of fees-free support** in the 2018 calendar year.

2018 Starters are then entitled to use fees-free support for up to 1 EFTS (120 credits) or up to \$12,000 of fees-free support – whichever cap the learner hits first.

See [Carryover settings for 2019](#) for more information on carry-over.

2019 marketing and resources

- From November 2 all learners who log on to their NZQA portal will receive an advert encouraging them to check their eligibility for 2019.
- Check out the [learner marketing material](#) we've created for tertiary education organisation use.
- Don't forget to follow the [Fees Free Facebook](#) page. We'll be posting information weekly for all fees-free learners.

Claiming fees-free support (payments) for provider based study – 2018 versus 2019

We've received queries regarding summer school (Trimester 3) enrolments and rolling enrolments, e.g. for learners undertaking programmes which run over two calendar years.

Whether a learner can receive fees-free support for this study depends on:

1. the course start date, and
2. how much study the learner has already undertaken.

If the course start date is in the 2018 calendar year

Eligible learners can receive fees-free support if they haven't consumed more than \$12,000 (including GST) of fees-free support. There is no EFTS/credit cap in the learners first calendar year of study.

This means that you should report all eligible learners who commence a course on or before 31 December 2018. Please note, for courses starting in 2018, the course can end after 2018.

We'll confirm whether the enrolment is eligible for fees-free support, including whether the learner has already used more than their \$12,000 entitlement.

Where a student has used more than their \$12,000 entitlement we will advise you each month in the Fees-Free Multiple Providers and Cap Limit report:

- the amount that you've claimed
- the amount of your claim we've validated
- the fees-free support we'll pay, and
- the amount that you should invoice the learner.

If the course start date is in the 2019 calendar year

From October 2018 you can report courses that commence in 2019, but we will not include these 2018 payment wash-up calculations.

How do I know what the TEC will pay for in 2019?

We'll make bulk payments to you again in 2019. Your 2019 allocation and payment schedule will be included in Appendix One of your fees-free agreement. Along with your agreement, we have provided you with a fees-free allocation and payment methodology.

You can request a review of your fees-free allocation and payments

If you consider that your fees-free allocation and/or payments are inaccurate, once you have signed and returned your agreement, you may ask us to review your allocation and/or your payments.

We'll require you to complete a review template and include confirmed enrolment data. We'll provision the review template through Workspace 2 which will include the same information that you would provide in your monthly *Fees Free All Enrolments and Costs* returns.

We'll report to you when we know a learner has consumed their fees-free entitlement in 2018

We understand that you need to know when a learner has fully consumed their entitlement in 2018 and will not have a residual entitlement to carry-over to 2019.

Based on the reporting that you provide to us we'll confirm in November and December any learners enrolled with you that have consumed the fees-free entitlement. You'll then be able to invoice these learners and require them to pay fees in accordance with your usual processes.

After you report in January we will finalise all learners' carry-over balance

Following your reporting in January we'll finalise all learners' 2018 consumption and calculate any carry-over entitlement (second calendar year residual entitlement). This will allow us, where you have reported 2019 enrolments, to allocate any carry-over to 2019 courses and advise you of the fees-free support and any amount that the learner will be required to pay. We expect this information to be reported to you in early February 2019.

Reporting (providers)

October was a successful month for reporting!

Thanks to everyone for their continued efforts on reporting. We had 100% of TEOs successfully submit their October *Fees Free All Enrolments and Costs* return.

Percentage of TEOs who have successfully submitted their monthly fees-free report

May	June	July	August	September	October
92.5%	99.4%	98.8%	100%	99.4%	100%

2018 year-end provider reporting and payment wash-up

The reporting that you provide in January (*Fees Free All Enrolments and Costs* return) will be your final opportunity to report learner enrolments for the year 1 January to 31 December 2018. We'll use this information to finalise your payments for this period. This may result in an additional payment or a recovery of a portion of the payments that we've already made to you.

We can only include valid data in this final 2018 payment assessment. It is essential that we work with you between now and the close off of reporting (dates outlined below) to correct any errors that we've identified in your monthly *Fees Free All Enrolments and Costs Data Validation* report.

For an enrolment (row of your reporting) to be valid for payment, the following records must be valid:

- National Student Number
- Source of Funding
- Qualification
- Course
- Compulsory Tuition Fees and Compulsory Course Costs
- EFTS
- Compulsory Student Service Fees, and
- We'll also take into account how much of their entitlement the learner has already consumed.

If you have any questions please email the Sector Helpdesk at sectorhelpdesk@tec.govt.nz or your investment team.

Looking ahead to 2019 reporting

The February *Fees Free All Enrolments and Costs* return will be the first return with only 2019 data. This return should not include any courses which started in 2018.

You must report all courses starting in 2019 for all learners with a Yes (Y) or 2018 Starter (8) eligibility in the 2019 eligibility file.

We're planning to update the *Fees Free All Enrolments and Costs* template in February. This update includes a change that will only allow you to enter courses that start in 2019.

We're also updating the *Fees Free All Enrolments and Costs Data Validation* in February. This will include the date the National Student Number (NSN) became eligible for fees-free. Most learners will be eligible for fees-free from 1 January 2019. However, some learners may become eligible in-year, e.g. after 1 January 2019. It's important to identify these learners as they're only eligible to receive fees-free support (payments) for any courses which start on or after the date they become eligible.

2019 Fees-Free Multiple Providers and Cap Limit Report

We use this report to inform you of eligible learners who have fully consumed their fees-free entitlement, i.e. have consumed \$12,000 of fees-free support.

In 2019, this will include both learners who consumed all of their entitlement in 2018 and learners who consumed all of their entitlement in 2019.

If you receive this report please review it each month. This is important to understand how much of the fees are covered by fees-free payments.

Courses with zero fees

You must include **all eligible learners** enrolled at your organisation in your monthly *Fees Free All Enrolments and Costs* returns. This includes eligible learners who are undertaking courses with zero course fees, e.g. eligible learners undertaking courses with a Source of Funding code 01 even if the course fees are zero, and eligible learners undertaking level 3 Youth Guarantee (YG) and Māori and Pasifika Trades Training (MPTT) courses.

If you have an eligible learner who is undertaking a course/courses with zero fees, please ensure you enter all applicable information. **Enter 0.00** for all cells where a dollar amount is required.

It's important to include these learners so we can track their consumption use for carry-over purposes. If we don't know how many EFTS they've consumed in 2018, we can't inform the learner, or you as their provider, whether they have entitlement to carry-over and, if so, how much they're entitled to carry-over.

MPTT and YG study at level 3

Some study on the New Zealand Qualifications Framework (NZQF) at level 3 or above was already fees free prior to the introduction of the fees-free policy in 2018. Certain funds are completely subsidised by the Government making them fees free for learners. These include the MPTT Fund and YG Fund.

Even if a course isn't eligible to receive fees-free payments (because it is subsidised by the Government through means other than the fees-free policy), eligible learners undertaking this study at NZQF level 3

need to be included in your *Fees Free All Enrolments and Costs* return.

It's important to include these learners so we can track their consumption use for carry-over purposes. If we don't know how many EFTS they've consumed in 2018, we can't inform the learner, or you as their provider, whether they have entitlement to carry-over and, if so, how much they're entitled to carry-over.

If you have an eligible learner who is undertaking a course/courses with zero fees, please ensure you enter all applicable information. **Enter 0.00** for all cells where a dollar amount is required.

Withdrawals

If a learner withdraws from a course, you need to enter a date in the **Student Course Withdrawal Date** column. The date entered is the date the learner withdrew from the course, not the date the course ended.

If you are charging the learner zero fees, **enter 0.00** for all cells where a dollar amount is required. Note, any fee amount you enter is an amount you are charging to the learner.

If you are charging a withdrawal fee please select **Other** from the drop-down list in the **Non-Standard Fee** column and update the **Source of Funding** column accordingly. The withdrawal fee must be entered into the **Course Tuition Fee (GST Exclusive \$)** and **GST charged on the Course Tuition Fee** columns.

If a learner has withdrawn from a course before 10% of the course length or one month, whichever is the lesser, then the Source of Funding **must be 31**. If not, then you'll receive an error in the Fees Free All Enrolments and Costs Data Validation report.

The TEC Monitoring and Crown Ownership team (MCO) are currently reviewing all compulsory student services fees (CSSF) where you have attested that they meet both the Education Act 1989 and Ministerial Direction's requirements.

Where MCO are unable to verify the CSSF that you have charged you will receive a "Query" result in the *Fees Free All Enrolments and Costs Data Validation*. For the results "Query", please review your fee and contact the MCO team at cssf@tec.govt.nz to discuss.

Reporting (industry training)

2018 year-end ITO reporting and payment wash-up

We intend to use the reporting that you provide in January to finalise your payments for this period. This may result in an additional payment or a recovery of a portion of the payments that we've already made to you.

We understand that not all eligible learners who commenced training in 2018 will be recorded in the Industry Training Register (ITR) at this time. We'll work with you on a way to report these learners.

Reporting schedule

Providers

14 November	November <i>Fees Free All Enrolments and Costs</i> template and instructions sent to you via Workspace 2
15 November	Extract date for November <i>Fees Free All Enrolments and Costs</i> return
21 November	November <i>Fees Free All Enrolments and Costs</i> return due to TEC by uploading to Workspace 2

5 December	December <i>Fees Free All Enrolments and Costs</i> template and instructions sent to you via Workspace 2
6 December	Extract date for December <i>Fees Free All Enrolments and Costs</i> return
12 December	December <i>Fees Free All Enrolments and Costs</i> return due to TEC by uploading to Workspace 2
17 December	January <i>Fees Free All Enrolments and Costs</i> template and instructions sent to you via Workspace 2
1 January	Extract date for January <i>Fees Free All Enrolments and Costs</i> return
11 January	January <i>Fees Free All Enrolments and Costs</i> return due to TEC by uploading to Workspace 2
13 February	February <i>Fees Free All Enrolments and Costs</i> template and instructions sent to you via Workspace 2
14 February	Extract date for February <i>Fees Free All Enrolments and Costs</i> return
20 February	February <i>Fees Free All Enrolments and Costs</i> return due to TEC by uploading to Workspace 2

Industry training organisations

5 December	December <i>Fees Free ITO Enrolments and Costs</i> template and instructions sent to you via Workspace 2
12 December	December <i>Fees Free ITO Enrolments and Costs</i> template due to TEC by uploading to Workspace 2
16 January	January <i>Fees Free ITO Enrolments and Costs</i> template and instructions sent to you via Workspace 2
23 January	January <i>Fees Free ITO Enrolments and Costs</i> template due to TEC by uploading to Workspace 2

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