



## Kia ora!

Welcome to the Fees Free newsletter for January, with tips to help make implementing fees-free easier for you, and easier for your learners.

Please encourage all those working to implement fees-free in your organisation to subscribe to this newsletter and receive updates directly.

If you'd like to view fees-free newsletters from previous months, these are available on the [TEC](#) website.

## How to check whether a 2018 Starter has fully consumed their fees-free entitlement

The *NSNs Consuming Fees Free in 2018* report lists all National Student Numbers (NSNs) who have a '2018 starter' (8) status (that is, they have undertaken eligible study and/or training in 2018).

The report states whether the NSN has fully consumed their fees-free entitlement (consumed) or whether they have some fees-free entitlement to carry forward (carryover). The report also states whether the learner was, or currently is, enrolled at more than one tertiary education organisation (TEO).

A few things to note about the report:

- The report is based off monthly Fees Free returns. There are a number of scenarios, including 2018 eligibility changes, which may affect the learner's consumption. As a result, the report is dynamic and should be checked regularly.
- Due to privacy requirements, we can't specify the amount of equivalent full-time student (EFTS), fees-free payments or months consumed. While we can tell you if a learner is, or has been, enrolled at more than one TEO, we can't specify which TEOs.

## Where to find the report

The report is located in Workspace 2, in the Notices section.

## Calculating learners' 2018 consumption and 2019 allocation (carryover) amounts

We'll calculate all 2018 Starters' consumption and 2019 allocations. **Please do not calculate this yourself.**

To ensure we have the correct calculations, please report all eligible learners' full 2018 enrolment including tuition fees, compulsory course costs and Compulsory Student Services Fees (CSSF) to us. You should also report 2019 enrolments even if you haven't updated your fees in Services for Tertiary Education Organisations (STEO) yet.

We'll then determine the learners' 2018 consumption and let you know what we'll cover in 2019 as part of the monthly reporting process. This will start when you receive your January reporting back in February.

Please note, any information we give you is subject to change where:

- a learner successfully appeals their 2018 eligibility status
- we receive additional information that shows a learner's 2018 eligibility status is incorrect, or
- we identify through the Single Data Return (SDR) or Industry Training Register (ITR) that a learner who asserts their eligibility in 2019 undertook study or training in 2018 and consumed some or all of their fees-free entitlement.

## Are 2018 Starters considered to be 'eligible' for fees-free in 2019

**Yes** – we classify any learners who have met the eligibility criteria as 'eligible' regardless of when, or if, the learner fully consumes their fees-free entitlement.

For example, if an eligible learner undertook study in 2018 and fully consumed their fees-free entitlement, they are still considered to be 'eligible' for fees-free in 2019. However, the learner won't have any remaining fees-free entitlement (carryover) to use in 2019.

**A learner is eligible for fees-free if they meet the eligibility criteria for the year they start eligible study and/or training.**

## Learners who weren't eligible in 2018 but meet the eligibility criteria in 2019

There may be learners who were not eligible for fees-free in 2018 but are eligible in 2019, that is, their eligibility status in 2018 was 'Unknown' or 'No' and their eligibility status in 2019 is 'Yes.' For example, a person who was at school in 2017 and only met the residency criteria in 2019.

### Action

You should check **all of your learners** to see whether they're eligible for fees-free, not just those who are starting study and/or training in 2019.

## Checking a learner's eligibility status

To check a learner's eligibility status, go to [www.feesfree.govt.nz](http://www.feesfree.govt.nz) and enter their NSN.

For large volumes of NSNs, please email a CSV file with a list of NSNs through to [feesfreedata@tec.govt.nz](mailto:feesfreedata@tec.govt.nz). We'll return the eligibility results to you the next TEC business day.

We recommend you check all of your learners' eligibility status **prior to submitting your monthly Fees Free return**, not just at the time of enrolment. This ensures your records are up-to-date.

## Course and industry training programme eligibility criteria 2019

To be eligible for fees-free payments, an eligible learner must be enrolled in an eligible course or eligible industry training programme.

### An eligible course is:

1. funded by the TEC from either:
  1. the Student Achievement Component (SAC) level 3 and above fund, or
  2. grants under s321 of the Education Act 1989 for tertiary provision that is part of a qualification or training scheme on the New Zealand Qualifications Framework (NZQF) at level 3 or above, or
  3. the Youth Guarantee fund and leads to the award of a qualification on the NZQF at level 3 or above, and
2. not part of a school learning programme or secondary-tertiary programme.

Note, the Māori and Pasifika Trades Training (MPTT) funding is eligible for fees-free as it is a top-up to SAC level 3 and above funding.

### An eligible industry training programme is:

1. at NZQF level 3 or above, and
2. approved by New Zealand Qualifications Authority (NZQA), and
3. comprised of at least 120 credits (which includes all New Zealand Apprenticeships), and
4. not part of a school learning programme or secondary-tertiary programme.

The 2019 eligibility criteria is available on the [TEC](#) website.

## Reporting (providers)

### Completion of fees-free 2018

The final 2018 *Fees Free All Enrolments and Costs* return is **due Wednesday 16 January**. This return is your final opportunity to correctly report learner enrolments for the year 1 January to 31 December 2018.

Once we have the full set of 2018 data, we'll generate an updated *NSNs Consuming Fees Free in 2018* report.

If you've reviewed this report and have concerns you need to contact the [Sector Helpdesk](#) with specific issues. You must include the following information when you contact the Sector Helpdesk: EDUMIS, NSN, Course or Fee Code and the issue. This will allow us to identify the specific fee to review.

Once this has been completed there may still be information that we need to manage fees-free, or other information that you need to supply to us related to 2018 study. This will be managed on a case by case basis.

### **February Fees Free All Enrolments and Costs return – due 20 February**

From February, each *Fees Free All Enrolments and Costs* monthly return should include **all the fees** for learners who have an eligibility status of 'Yes' or '2018 Starter'. Returns should now only include 2019 data, that is, courses which have a start date in 2019.

For '2018 Starters', include **all of the courses they are enrolled in – even if they have fully consumed their fees-free entitlement**. It's important we continue to monitor the enrolments of these learners as this will be used by the Ministry of Education to develop future fees-free policy.

### **Withdrawals – training video now available**

We've produced a training video on how to report withdrawals in the *Fees Free All Enrolments and Costs* return. This video is targeted at private training establishments (PTEs) however has information which may be helpful for all providers.

The video is now available in the following places:

- YouTube – <https://www.youtube.com/watch?v=HdbHYL6KSFE>
- [Guidance](#) page on the TEC website, under Instructional Videos, and
- the Help section of Workspace 2 under Instructional Videos.

### **Withdrawals – if a learner withdraws from one or more courses *after* your organisation's withdrawal date and you retain any fee and/or they consume EFTS**

You need to include the learner's course details in relevant *Fees Free All Enrolments and Costs* return(s).

You should record:

- All applicable fields need to be completed for the learner. Enter the Source of Funding code as **31 if the withdrawal date is within 10% or one calendar month of the start date** of the course (whichever is earlier).
- If the learner hasn't used any EFTS, report the EFTS value as 0.000.
- The fees you are charging (if any).

## Reporting schedule

### Providers

16 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
13 March	March <i>Fees Free All Enrolments and Costs</i> template and instructions sent to you via Workspace 2
14 March	Extract date for March <i>Fees Free All Enrolments and Costs</i> return
20 March	March <i>Fees Free All Enrolments and Costs</i> return due to TEC by uploading to Workspace 2
16 April	April <i>Fees Free All Enrolments and Costs</i> template and instructions sent to you via Workspace 2
15 April	Extract date for April <i>Fees Free All Enrolments and Costs</i> return
29 April	April <i>Fees Free All Enrolments and Costs</i> return due to TEC by uploading to Workspace 2
15 May	May <i>Fees Free All Enrolments and Costs</i> template and instructions sent to you via Workspace 2
16 May	Extract date for May <i>Fees Free All Enrolments and Costs</i> return
22 May	May <i>Fees Free All Enrolments and Costs</i> return due to TEC by uploading to Workspace 2

### Industry training

16 January	January <i>Fees Free ITO Enrolments and Costs</i> template and instructions sent to you via Workspace 2 (Note: This was provisioned early, this remains due to TEC on 23 January)
23 January	January <i>Fees Free ITO Enrolments and Costs</i> template due to TEC by uploading to Workspace 2
End January	Fees Free ITO invoicing starts

**Free to unlock your potential**

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**Our mailing address is:**

[sectorhelpdesk@tec.govt.nz](mailto:sectorhelpdesk@tec.govt.nz)

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