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Welcome!

Welcome to the fees-free newsletter for July, with tips to help smooth the way for you implementing fees-free, and for your learners accessing the initiative. Please encourage all those working to implement fees-free in your organisation to subscribe and receive updates directly.

[Click here to subscribe](#)

Programme update

Thank you to all who attended the joint Ministry of Education and Tertiary Education Commission fees-free workshops last week. We appreciate the time commitment made to attend and value the input into possible policy adjustments and operational improvements for fees-free in 2019. The next round of workshops will be in early to mid-August.

Consumption and carryover (provider-based)

In 2018, fees-free support is capped at \$12,000 (including GST) per learner. There is no equivalent full-time student (EFTS) cap. So any learner eligible for fees-free can receive up to \$12,000 (including GST) for any eligible provider-based study they undertake in 2018.

Learners who don't use a full one EFTS in 2018 can carry forward their remaining fees-free entitlement to 2019 (or future years). This is assuming the learner hasn't consumed more than \$12,000 (including GST) worth of fees-free support. Carryover settings for 2019 are yet to be confirmed but are likely to include a dollar and EFTS component.

Eligible learners cannot “bank” their entitlement for future use

If a learner is eligible for fees-free they cannot opt to pay fees in 2018 and “bank” their entitlement for future use. Eligible learners cannot ‘opt out’ of fees-free. So any eligible learner who has a ‘yes’ eligibility status (and should be included in your fees-free returns) is automatically consuming fees-free support.

We have updated the FAQ relating to “banking” entitlement on the [TEC website](#) (see updates to the TEC website below).

Fees-free eligible learners who have paid for their fees in 2018

If, for any reason, a fees-free eligible learner with an eligibility status of ‘yes’ has been charged fees in 2018 you should include this learner in your next monthly fees-free return. Any costs paid by the learner (up to the value of \$12,000 including GST for provider-based study) will need to be refunded.

Updates to the TEC website

July and August fees-free reporting dates have been added to the [business calendar](#).

We have updated the following two [FAQs](#):

Can learners pay for some fees themselves and use their fees-free in another year?

No, learners cannot ‘bank’ their fees-free entitlement for future use. This means if they start studying or training in 2018 and are eligible for fees-free, they cannot opt to pay for some of their fees themselves and ‘bank’ some of their fees-free study to use later.

However, learners can study part-time and spread their fees-free entitlement over multiple years. See the FAQ: “Will part-time learners be eligible for fees-free?”

Will a learner still be entitled to fees-free in the future if they withdraw from their course or programme in 2018?

Provider-based study

If learners withdraw by their provider’s withdrawal date and are entitled to a full refund, then they are likely to be eligible for fees-free next year (provided they and their course or programme still meet all the eligibility criteria).

If they withdraw after the withdrawal date, then their ongoing fees-free entitlement will depend on the EFTS and cost of fees of their study they were enrolled in.

Industry-based training and apprenticeships

If an industry trainee or apprentice withdraws from their programme in 2018, they may still be entitled to fees-free in the future. Any ongoing fees-free entitlement depends on the amount of training they completed before they withdrew.

For more information, see the FAQ on the [TEC website](#) “What are the rules around withdrawals and tuition fee refunds if a learner withdraws from their course?”

Updates to the Fees Free website

We have updated the following [FAQ](#):

I started a course(s) in 2017 that finishes in 2018, how does this affect my fees-free eligibility?

For provider-based study (with a university, institute of technology or polytechnic, wānanga or private training establishment) a course must have started in 2018 to be eligible for fees-free. So any course that has a start date in 2017 is not eligible for fees-free. Any course(s) you undertook in 2017 will count as prior study. This course start date information is given to us by your provider. If you have any questions about this please talk to your provider.

To be eligible for fees-free, you must not have previously undertaken more than half a year of equivalent full-time tertiary education (0.5 EFTS or 60 credits) at level 3 or above on the New Zealand Qualifications Framework, including tertiary education at an equivalent level in any other country. This does not apply if you are a 2017 or 2018 school leaver.

For industry training and apprenticeships, the programme must start in 2018 to be eligible for fees-free. Learners who enrolled in their programme in 2017 or earlier may not be eligible for fees-free because this will count towards prior study.

Reporting (provider-based)

In this section we'll keep you informed of any key changes to reporting and answer FAQs about reporting.

Following the submission of your Fees Free All Enrolments and Costs return we'll send you two reports

Fees Free All Enrolments and Costs Data Validation

This report:

- lists all the data TEOs have submitted to us, and
- tells TEOs whether the data meets the criteria being tested.

A Fees Free All Enrolments and Costs Data Validation Guide accompanies this report. The guide sets out how we assessed the previous month's Fees Free All Enrolments and Costs data return.

We'll be focussing on withdrawals and related Source of Funding codes this month. You may see some changes in your validation in relation to this.

Fees Free Multiple Providers and Cap Limit

This report has had different formats and, based on feedback, it will now only include learners who use more than \$12,000 (including GST) at one or more provider. We are working on another way to inform you of all fees-free eligible learners enrolments.

This report identifies all those learners who:

- have gone over the \$12,000 (including GST) cap, and who will need to be charged by you for any fees over \$12,000 (including GST), and

- have gone over \$12,000 (including GST) with multiple providers, and who will need to be charged by you for your allocation of any fees over \$12,000 (including GST).

There will be no changes to the Fees Free All Enrolments and Costs return template until October 2018

From October, we are looking at introducing a recognition of prior learning (RPL) field in the Fees Free All Enrolments and Costs return. This will allow us to make sure EFTS values and fees are recorded correctly.

We are also looking at the best way for you to report withdrawal fees where these differ to the value of the course fees.

Any changes to the template will be explained in the relevant reporting instructions and fees-free newsletter.

Changes to the August Single Data Return (SDR) do not change the current schedule of monthly fees-free reporting

TEOs will have received information from the Ministry of Education about updates to the August SDR. These updates are outlined on the [Services for Tertiary Education Organisations \(STEO\)](#) website.

TEOs are still required to submit a monthly Fees Free All Enrolments and Costs return to Workspace 2.

Overview of fees-free reporting submission

We've seen a high success rate for TEOs submitting their monthly fees-free reporting.

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

January	February	March	April	May	June
94.4%	95.7%	97.5%	99.4%	92.5%	99.4%

Submitting your monthly reports is important for tracking learners use of fees-free, tracking future carryover, and our ability to make future payments and calculate in year adjustments is dependent on the information provided.

When completing your monthly fees-free report, please remember:

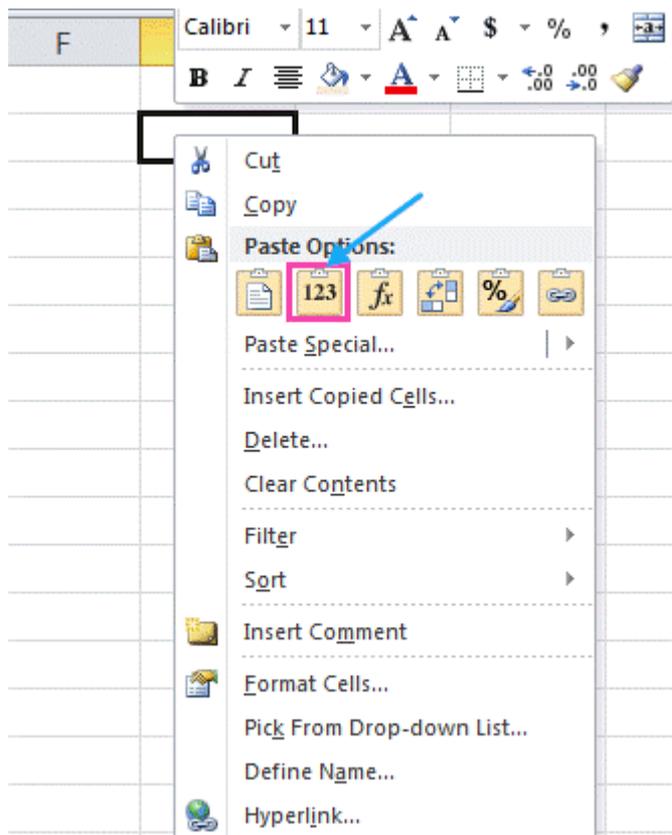
- Include **all** 2018 fees-free enrolments, even if the learner hasn't started study yet, i.e. because they start study later in the year.
- If including a **Student Course Withdrawal Date** this should not be a future date. A "withdrawal" is when a student ceases to be enrolled or participate in a course, programme or training scheme (regardless of whether they have been refunded any fees). The withdrawal date must be prior to the date the report is submitted.
- All **Source of Funding** codes must be eligible for fees-free payments.
 - Only the following Source of Funding codes are valid for fees-free: 01, 03, 22, 29, 30, 31, and 32.
 - The Source of Funding code 01 should have EFTS and fees entered.
 - The Source of Funding code 31 should be used for early withdrawals. This should have 0 EFTS and course tuition fees only under some circumstances.

- The Source of Funding code 22 should have no fees.
- The Source of Funding code 29 should not have any tuition fees or compulsory course costs.
- The **Fee Description** column may be used to describe the compulsory student services fee (if applicable). It should not be used to enter in the amount of course tuition fees or course related information.
- In the **Compulsory Student Services Fee** column please only enter 'Y' (if you do charge a compulsory student services fee) or 'N' (if you don't charge a compulsory student services fee). You may also leave the cell blank if you don't charge a compulsory student services fee.
 - If you do charge a compulsory student services fee you need to enter a dollar amount in the **Compulsory Student Services Fee (GST Excl \$)** column.
 - If you don't charge a compulsory student services fee you should leave the **Compulsory Student Services Fee (GST Excl \$)** column blank.

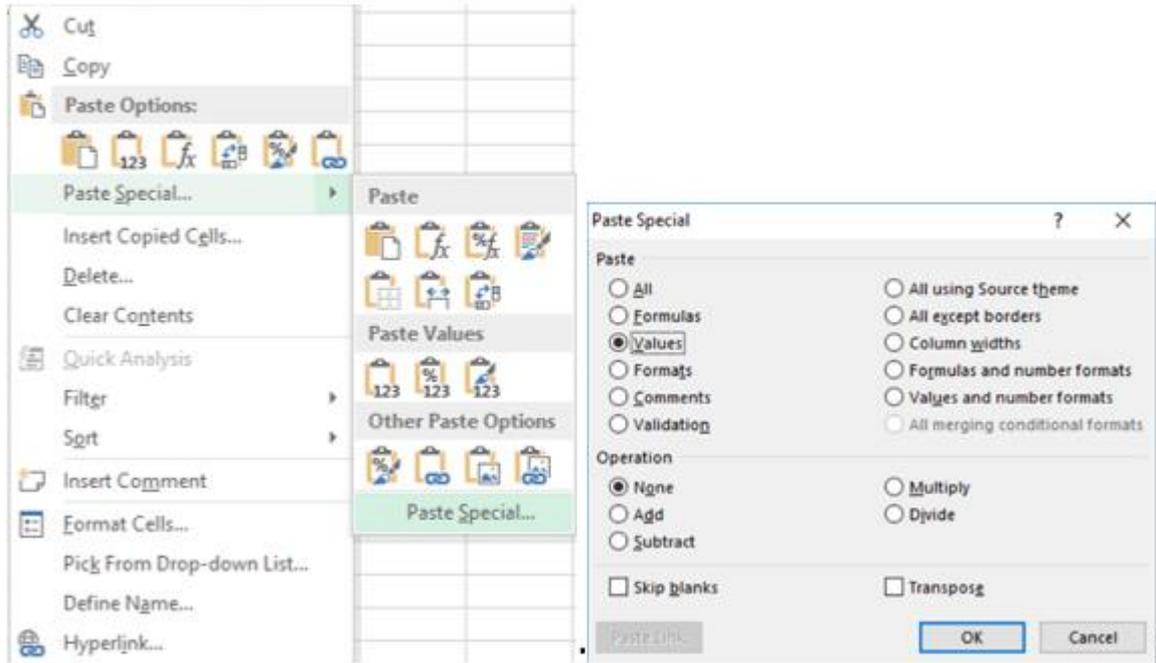
If copying and pasting from another source please use Paste Values

Our template has certain formatting and our system can only accept that formatting.

The below images show how to select **Paste Values** when pasting.



or



Has your report failed submission?

Once you submit your fees-free report it is important to check the status of the report. If submission fails, you need to call the Sector Helpdesk to help resolve the issue.

Generally, a submission will fail when a copying and pasting process overrides the templates base formatting. As noted above, please ensure you copy and paste using **Paste Values**. You must also ensure the name of the report remains the same.

Dates to diary...

To assist you with your report planning here are the upcoming reporting dates.

Industry training organisations – please take note of the July dates. We will confirm the dates of future month's returns at a later stage.

11 July	July Fees-Free Report template and instructions sent to you via Workspace 2
12 July	Extract date for July Fees-Free Report
18 July	July Fees-Free Report due to TEC by uploading to Workspace 2
6 August	August Fees-Free Report template and instructions sent to you via Workspace 2
7 August	Extract date for August Fees-Free Report
13 August	August Fees-Free Report due to TEC by uploading to Workspace 2
12 September	September Fees-Free Report template and instructions sent to you via Workspace 2
13 September	Extract date for September Fees-Free Report
19 September	September Fees-Free Report due to TEC by uploading to Workspace 2

Have any questions?

The Sector Helpdesk is available to answer any questions you may have about fees-free. Email sectorhelpdesk@tec.govt.nz or call 0800 601 301.



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April 2018

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sectorhelpdesk@tec.govt.nz

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