



Kia ora!

Welcome to the Fees Free newsletter for October, 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.

Programme update

We're busy getting ready for 2019, including preparing the 2019 eligibility tool and updating website content. As soon as we're ready to launch 2019 fees-free we'll let you know. Prior to launching the refreshed fees-free website, we'll send a newsletter which provides you with an overview of what's new and links to key webpages and documents.

Learners with an unknown eligibility status who may be eligible 2018

Please remind any learners who have been, or are currently, enrolled at your organisation with an unknown eligibility status to double check the [eligibility criteria](#). If they meet the criteria, they should complete and submit a statutory declaration form **as soon as possible**. This is important to ensure they receive fees-free support for any eligible study or training undertaken this year.

A statutory declaration form can be accessed through the [fees-free](#) website. Learners undertaking provider-based study need their National Student Number (NSN) to access a form, while learners undertaking industry training don't need a NSN.

Reporting (providers)

Why we collect fees-free data and what we use it for

We collect fees-free data through your monthly *Fees Free All Enrolments and Costs* returns. We use the information captured through these returns to:

- track learner's use of their fees-free entitlement (and as a result assess their future possible carryover)
- advise providers when they're required to invoice a learner for fees, e.g. because the learner has used their full fees-free entitlement
- give providers certainty about payments for fees-free eligible learners

- identify compliance issues, and
- model future fees-free usage based on actual data rather than expected fees.

We're always happy to receive feedback and make iterative improvements to the reporting. Any feedback should be sent to sectorhelpdesk@tec.govt.nz.

Updates to the *Fees Free All Enrolments and Costs* return template

As noted in previous months' fees-free newsletters, we're making changes to the *Fees Free All Enrolments and Costs* return template from October. These changes are outlined below.

1. The Fees Free column will be renamed Non-Standard Fee

The purpose of this change is to identify if the learner's personal circumstances have impacted the fee you've charged the learner or the EFTS undertaken by the learner in relation to a specific course. This may include where you have applied Recognition of Prior Learning (RPL) or other reasons, for example the learner received special consideration due to exceptional personal circumstances.

You're required to charge the same fee for every learner (whether or not they're eligible for fees-free) in the same circumstances who is enrolled in the same course. This field will allow us to understand why a fee may differ between learners enrolled in the same course.

We expect you to report the EFTS amount entered in Services for Tertiary Education Organisations (STEO) for each course. This field will allow us to understand why an EFTS amount may differ from the amount recorded in STEO.

You must enter:

- 'RPL' (if the EFTS value/fees vary because the learner was awarded RPL), or
- 'Other' (if the EFTS value/fees vary for some other reason), or
- 'No' (if the EFTS value matches STEO and the fees is the amount that you usually charge to learners).

If you enter 'RPL' or 'Other' you may provide a description of the reason the learner is being charged a different fee or the EFTS do not equal STEO in the **any explanatory comments** column. This is not mandatory, but any additional information will help our monitoring team when they design their audit programme.

For more information on RPL please see the [Careers New Zealand](http://careers.govt.nz) website.

We'll continue to assess the eligibility status of each NSN entered in your return. However, you won't be required to enter whether the NSN is eligible or not.

2. The Course Start Date validation will be amended so you can enter course start dates on or before 31 December 2019

The purpose of this change is to allow you to include courses and programmes with a start date in 2019.

You must enter:

- A date between 01/01/2018 and 31/12/2019.
- A Course Start Date which is the same as the Course Start Date recorded in your SDR.

Please note from October we'll collect this information and validate the records but will only make payments for courses starting in 2018.

3. The Student Course Withdrawal Date validation will be amended so you cannot enter dates in the future

The purpose of this change is to ensure only dates on or before the date of submission can be entered.

You must enter:

- A Student Course Withdrawal Date which is the same as the Student Course Withdrawal Date recorded in your SDR.

4. We're going to limit what can be entered in the following columns: Non-Standard Fee, Source of Funding and Compulsory Student Services Fee

The purpose of this change is to ensure only correct data is entered.

- **Non-Standard Fee:** Validation described above.
- **Source of Funding:** The following Source of Funding codes will be accepted: 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, 13, 14, 15, 16, 20, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 35, and 36. Please refer to the SDR Manual for the meaning of each code.
- **Compulsory Student Services Fee:** Validation described below.

5. The Compulsory Student Services Fee validation will be amended so that if you enter 'Y' you're required to complete other relevant columns

The purpose of this change is to ensure all correct columns are completed.

You must enter:

- 'Y' if the student service fee is a Compulsory Student Services Fees and is eligible to receive fees-free payment. If you enter 'Y', you also need to complete the following columns:
 - Fee Code
 - Fee Description
 - Compulsory Student Services Fee (GST Excl \$), and
 - GST Charged on Compulsory Student Services Fee.

or

- 'N' if the student service fee is not eligible to receive fees-free payment.

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

The following reports are available on Workspace 2. Please remember to check these following the submission of your monthly *Fees Free All Enrolments and Costs* return.

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* return.

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).

Remember to validate your learners' eligibility

On the Notices section of your Workspace 2 Home page, you'll find a notice called **Lists of NSNs eligible for Fees Free study**. This page lists the following three ways that we use to tell you about the eligibility of learners:

1. **Fees Free Eligibility** – this file contains all NSNs that have been assessed as eligible for fees-free. We update this list each business day.
2. **Fees Free Eligibility Changes** – this file contains all NSNs whose eligibility has changed to or from “Yes” since the launch of fees-free. We update this list each business day.
3. **Checking the eligibility of specific NSNs** – this file is for you to check the eligibility of NSNs. You must request this file from the Sector Helpdesk.

Please remember to regularly check the *Fees Free Eligibility Changes* file to see if any learner's eligibility status has changed.

Reporting information not reaching the right person?

If you need a staff member added as a fees-free data return contact for your organisation, please request this by emailing the Sector Helpdesk at sectorhelpdesk@tec.govt.nz including their name, job title and email address. Your organisation can have more than one data return contact.

Dates to diary...

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

Provider-based

17 October	October Fees-Free Report template and instructions sent to you via Workspace 2
18 October	Extract date for October Fees-Free Report
24 October	October Fees-Free Report due to TEC by uploading to Workspace 2
14 November	November Fees-Free Report template and instructions sent to you via Workspace 2
15 November	Extract date for November Fees-Free Report
21 November	November Fees-Free Report due to TEC by uploading to Workspace 2
5 December	December Fees-Free Report template and instructions sent to you via Workspace 2
6 December	Extract date for December Fees-Free Report
12 December	December Fees-Free Report due to TEC by uploading to Workspace 2
17 December	January Fees-Free Report template and instructions sent to you via Workspace 2
1 January	Extract date for January Fees-Free Report
11 January	January Fees-Free Report due to TEC by uploading to Workspace 2

Industry training

5 November	Fees-Free Report template and instructions sent to you via Workspace 2
12 November	Fees-Free Report due to TEC by uploading to Workspace 2
5 December	Fees-Free Report template and instructions sent to you via Workspace 2
12 December	Fees-Free Report due to TEC by uploading to Workspace 2
16 January	Fees-Free Report template and instructions sent to you via Workspace 2
23 January	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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October 2018*