Kia ora!

Welcome to the Fees-Free newsletter for December, 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.

Programme update

The countdown to Christmas is on! It's been a busy year and we appreciate your continued efforts and engagement in implementing the fees-free policy.

We've got some reminders for things to do prior to the end of the year:

1. Remind all learners with an 'unknown' eligibility status who have been, or are currently, enrolled at your organisation and have undertaken eligible study or training in 2018 to complete and submit a 2018 statutory declaration form if they meet the eligibility criteria (see *retrospective eligibility* below).

2. Invoice learners with an 'unknown' eligibility status.

3. Submit your December Fees Free return.

4. Plan your January Fees Free return.

5. We're looking at holding a webinar to provide more information on wash-ups. This session will give you an opportunity to ask any questions you may have. If this would be useful to you, please email sectorhelpdesk@tec.govt.nz with your interest.

Please note the TEC is closed from Tuesday 25 December, opening again on Thursday 3 January 2019.

2019 looks set to be another busy year for fees-free! Until then, we wish you all a safe and enjoyable Christmas and New Year – **Ngā mihi o te Kirihimete me te Tau Hou**.

Checking a learner's eligibility status

When checking a learner's eligibility status, please check the correct year.

- If a learner is starting fees-free courses/training in the 2018 calendar year – the 2018 eligibility criteria apply.
- If a learner is starting fees-free courses/training in the 2019 calendar year – the 2019 eligibility criteria apply.

If a learner is eligible for fees-free (i.e. their eligibility status is 'Y') **and has consumed some fees-free entitlement** – their eligibility does **not** change in future years. The learner will still be considered to be 'eligible' for fees-free and their eligibility status is now '8' (indicating they're a 2018 Starter). This applies even if the learner fully consumes their fees-free entitlement (they just won't have any fees-free entitlement left to use).

Please note, **if a learner is eligible for fees-free industry training** and wants to start fees-free provider-based study, they **may be required to submit a provider-based statutory declaration form**. This is because we require more information from learners undertaking provider-based study as the eligibility criteria for provider-based study and industry training are different.

An info sheet setting out the 2018 and 2019 eligibility criteria is available on the TEC website.
- TEC website – download the 2018 and 2019 eligibility criteria info sheet

Note for industry training organisations

You should continue to report all eligible learners undertaking eligible programmes in both the December and January *Fees Free ITO Enrolments and Costs* returns.

When we move to invoice-based reporting you'll need to check eligibility status each month. If you find eligibility status changes for one of your learners, contact the Sector Helpdesk at sectorhelpdesk@tec.govt.nz or 0800 601 301.

2018 Starters '8'

The '8' status means both that a learner is eligible for fees-free and that the learner has consumed some fees-free entitlement in the 2018 calendar year. This includes eligible learners who did training through Māori and Pasifika Trades Training (MPTT) in 2018.

The '8' status indicates that the learner does not have their full fees-free entitlement remaining. The learner may have no fees-free entitlement left to use. This depends on whether they're entitled to carryover. Learners who undertake less than 1 equivalent full-time student (EFTS) (120 credits) and use less than \$12,000 (including GST) of fees-free support or 24 months of industry training in the 2018 calendar year can carry forward their remaining fees-free entitlement (in dollars, EFTS and months).

Regardless of whether a 2018 Starter has carryover or not, **the learner's eligibility status does not change**. They remain eligible for fees-free even if they have fully consumed their fees-free entitlement. In 2019, both learners with a 'Y' status and '8' status are eligible for fees-free.

Retrospective eligibility

Learners must claim for fees-free support in the calendar year that their first eligible course or industry training programme starts.

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

If they don't meet the deadline, any eligible study and/or training undertaken in 2018 will count for consumption but the learner won't be entitled to have fees-free support for this study and/or training. We will calculate if the learner has any carryover.

Learner's with an 'unknown' eligibility status

We've produced a report which lists all National Student Numbers (NSNs) with an 'unknown' eligibility status who may meet the fees-free eligibility criteria.

If a learner who was, or is currently, enrolled at your organisation (for study/training in 2018) is included in this list, the report has been provisioned to your Workspace 2. It includes communication resources which you can share with learners, encouraging them to submit a statutory declaration form if they meet the eligibility criteria.

We recommend you invoice these learners, rather than write-off their fees later.

Statutory declaration forms – update

The Education Amendment Act 2018 (the Act) passed into law on 23 October 2018. The Act has created a new offence under the Education Act 1989 for students who make a false representation in an application to receive fees-free tertiary education.
We're still working on how to operationalise this change. We can confirm **there will be no changes to the current statutory declaration process in 2018 or early 2019**.

See the Ministry of Education website for more information on the amendments made.

If a learner submitted a statutory declaration form in 2018, do they have to submit a new one for 2019?
In most cases, no
However, if the learner did not undertake any eligible study/training in 2018 but wants to start eligible study/training in 2019 and they have a 2019 'unknown' status they **need to submit a 2019 statutory declaration form**.

Also, if the learner submitted an industry training statutory declaration form in 2018 and wants to start eligible provider-based study in 2019 they **need to submit a 2019 provider based statutory declaration form** if their eligibility status is 'unknown.'

Letting us know about a learner's prior study

Please let us know if you have information about a learner that might change their fees-free eligibility status.

You need to provide this information to us through the *FF_TEOEligibilityStatusReport* in Workspace 2. To access this report, you need to request it from the Sector Helpdesk at sectorhelpdesk@tec.govt.nz.

The following information about courses undertaken by the learner (if applicable) must be entered in the **Description of evidence** field:

- The course start date and course end date.
- The tertiary education organisation (TEO) the course was undertaken at.
- The country the course was undertaken in.

If the fees-free team requires a more detailed description of evidence, the status of a learner's review will be changed to **Awaiting TEO response** in the report.

You'll be notified by the Sector Helpdesk when the report has been updated. We ask you to check those with the status **Awaiting TEO response** and provide the requested information in the same report as soon as possible.

Enrolment forms, or any other documents related to the learner's study, that you're able to provide will allow us to accurately assess a learner's eligibility status.

For more information on Workspace 2 please visit the TEC website.

Reporting (providers)

The reporting that you provide in January will be your **final opportunity** to correctly report learner enrolments for the year 1 January to 31 December 2018. It's important that this data is correct. If any data is incorrect, it will be excluded from your final wash-up calculation.

Providers – Please check your *Fees Free All Enrolments and Costs Data Validation* (available on Workspace 2) before submitting your final return.

If you're concerned about validation errors or want to test your returns, please provision it as early as possible. We'll work with you to ensure the template is completed correctly.

New report – Learners who have consumed their fees-free entitlement in 2018
From December 2018, we'll be publishing a monthly report which lists all NSNs who have undertaken eligible study and/or training in 2018. The report will state 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 will also state whether the learner is enrolled at more than one TEO.

A few things to note about the report:

- The report will be based off monthly Fees Free returns. There are a number of scenarios, including where a learner withdraws from a course(s), or data does not pass validation, which may change the learner's consumption. As a result, the report is dynamic and should be checked each month.
- Due to privacy requirements, we can't specify the amount of 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.

We intend to provision the first report by Thursday 6th.

The following information applies only to providers
2019
You can now enter 2019 courses in your *Fees Free All Enrolments and Costs* returns. While you'll receive a validation error for these courses, because 2019 fees won't be validated until 2019, this is nothing to worry about.

We'll validate 2019 courses following the submission of the January *Fees Free All Enrolments and Costs* return. We will not be accepting 2018 courses from the February *Fees Free All Enrolments and Costs* return onwards.

Non-Standard Fee – STP
We've added another option to the drop-down list in the **Non-Standard Fee** column. This option is **STP** (secondary-tertiary programme).

While we've built in this functionality now, it will only become mandatory from February 2019. **You are not required to select this option now**.

Further information about this option will be made available in the next few month's newsletters.

Training video
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.

We welcome any feedback you have on the video, please email sectorhelpdesk@tec.govt.nz. We'll look to produce more videos in the future so if you have any suggestions of topics please let us know.

Course fees – reporting all costs

Please report all course costs at the fee chargeable. This includes if the costs are more than $12,000 or (if applicable) more than the allocation amount given in the *Fees Free Multiple Providers and Cap Limit Report*. It's important you report the full amount charged to a learner so that we can give correct information to learners.

Course Tuition Fees and Compulsory Course Costs compared to Services for Tertiary Education Organisations (STEO)

We can only pay a course fee reported by you if:

1. the fee is equal to, or less than STEO
2. you charge that fee to every learner in the same circumstances (whether or not they are eligible for fees-free tertiary education) who is enrolled in the same course, and
3. that fee complies with Annual Maximum Fee Movement requirements.

If your fees are higher than what is entered in STEO you need to work with us to resolve this prior to the end of the year.

Compulsory Student Services Fees (CSSF)

If you're reporting eligible Compulsory Student Services Fees, you must also select 'Y' or 'N' to attest that the fee complies with both the Education Act 1989 and the Ministerial Direction requirements. The TEC Monitoring and Crown Ownership team (MCO) review all CSSFs to verify whether they comply with these requirements and should receive fees-free funding.

MCO must verify a CSSF is compliant before we can verify your *All Enrolments and Costs* return. You can contact MCO at cssf@tec.govt.nz.

Reporting schedule

Providers

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

Industry training

5 December	December *Fees Free ITO Enrolments and Costs* template and instructions sent to you via Workspace 2
12 December	December *Fees Free ITO Enrolments and Costs* template due to TEC by uploading to Workspace 2
16 January	January *Fees Free ITO Enrolments and Costs* template and instructions sent to you via Workspace 2
23 January	January *Fees Free ITO Enrolments and Costs* template due to TEC by uploading to Workspace 2
End January	Fees Free ITO invoicing starts

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December 2018

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sectorhelpdesk@tec.govt.nz

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