



Kia ora!

Welcome to the fees-free newsletter for September, 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 know it's almost enrolment time - learners are confirming their plans for 2019 and starting to apply for study and training.

We're continuing to work with the Minister, the Ministry of Education and other partner agencies to finalise the fees-free settings for 2019. This includes confirming the eligibility criteria and small changes to operational policy. Alongside this, we're making changes to processes to align them with the new settings and ensure they continue to be user-friendly. We'll confirm the date for announcements on final settings for 2019 soon.

Learners starting study or training in 2019 shouldn't be checking their eligibility yet

Until 2019 settings are confirmed, the fees-free website won't be updated with the eligibility criteria for 2019. We'll let you know when the fees-free website will be updated, shortly.

Learners starting study or training in 2018 can still check their 2018 eligibility at feesfree.govt.nz.

Matching fees-free returns to the Single Data Return (SDR) (providers)

We've matched your August SDR against your fees-free reporting. As a result, we've identified a number of eligible National Student Numbers (NSNs) who've been reported in SDR but not in fees-free reporting. There are also a number of records that are not reported in the same way in both SDR and fees-free, for example, the qualification and course are the same for an individual NSN but the Source of Funding code and/or Course Start Date are different.

Please note, you're required to report the same information for the following fields in both SDR and fees-free returns:

1. National Student Number
2. Qualification Code
3. Course Code
4. Course Start Date
5. Course End Date

6. Student Course Withdrawal Date, and

7. Source of Funding.

We'll follow up with you where we can see that the data is inconsistent.

Additionally, we've identified some NSNs that currently show an eligibility status of 'Unknown' but which may be eligible for fees-free. If these learners are eligible, it's important their eligibility status is changed to 'Yes' **before 2019**. Any equivalent full-time student (EFTS) and/or fees consumed in 2018 may count as 'consuming' their fees-free entitlement.

We'll be notifying you if we've identified learners at your organisation who may be eligible.

Learners with an unknown eligibility status who may be eligible

Please remind any other 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 **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 can be accessed through the [fees-free](#) website. Learners undertaking provider-based study need their NSN to access one, while learners undertaking industry training don't need a NSN.

Monitoring of compulsory student services fees (providers)

Compulsory student services fees (CSSF) may be used to support the delivery of student services.

The monthly Fees Free All Enrolments and Costs return requires you to input whether you're claiming CSSF for a course and, if so, you must also select 'Y' or 'N' to attest that the fee complies with the [Ministerial Direction](#).

If you enter 'Y' you have attested that the student service fee is eligible to receive fees-free payment.

For more information on CSSF see the [TEC](#) website.

Changing a learner's eligibility status (in Workspace 2)

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* report in Workspace 2.

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.

You're not required to supply a copy of the learner's transcripts.

For more information on Workspace 2 please see the [TEC](#) website.

Workspace 2 login

When accessing Workspace 2, please use your own login details. Your username and password are personal to you and, under the Workspace 2 terms of use, are not permitted to be shared with others.

To access Workspace 2, you use the Ministry of Education's [Education Sector Logon \(ESL\)](#) service and access 'TEC Shared Workspaces'.

If you don't already have an ESL user account, or you need to update your existing account, please visit the [Ministry of Education](#) website. You'll need to complete the [ESL 02 form](#).

Reporting (providers)

In preparation for 2019, we're making changes to reporting templates to ensure they incorporate both 2018 and 2019 learners. We'll inform you of any planned updates here and on the TEC website.

Overview of fees-free reporting submission

Last month we had a 100% success rate for TEOs submitting their monthly fees-free reporting! A big thank you to everyone for your continued efforts with monthly reporting.

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

Updates to the Fees Free All Enrolments and Costs return template

As noted in the July and August 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](#) 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.

Change to lists of NSNs eligible for fees-free study

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 files which we use to tell you about the eligibility of learners:

1. Fees Free Eligibility
2. Fees Free Eligibility Changes, and
3. Checking the eligibility of specific NSNs.

In coming weeks we'll be updating each of these files for 2019 to include an indicator which tells you the learners that started consuming fees-free entitlements in 2018.

Currently (for the 2018 calendar year), there are three status options: Y (yes), N (no) and U (unknown). For the 2019 calendar year's fees-free eligibility we'll be using the following statuses: **Y (yes), N (no), U (unknown) and 8 (2018 Starter)**. **2018 Starter** will indicate learners who have consumed some fees-free entitlement in 2018.

Please note:

- Each NSN may have multiple records. Both 2018 and 2019 eligibility may be reported.
- For the remainder of 2018, you should continue to use 2018 fees-free eligibility to identify those learners you should be including in your *Fees Free All Enrolments and Costs* returns.

We'll continue to indicate to you (through the *Fees-Free Multiple Providers and Cap Limit* Report) which of these learners has fully consumed so you'll be able to invoice them.

Wireframes for the new files will be made available shortly on the [Payments and reporting](#) page on the TEC website.

Confirming how withdrawals should be entered

Learners who withdraw and consume EFTS and/or fees-free entitlement (dollars) need to be included in your *Fees Free All Enrolments and Costs* report.

All applicable fields need to be completed for the learner, including:

- National Student Number
- Fees Free
- Qualification Code
- Course Code
- Course Start Date
- Course End Date
- Student Course Withdrawal Date
- Course EFTS Factor

- Source of Funding
- Course Tuition Fees (GST Excl \$)
- GST Charged on Course Tuition Fees, and
- other fees if applicable.

In relation to withdrawals, you should include **only the fees that you're requesting payment for**. Please note, this only applies to withdrawals. For all other eligible learners, you must include all courses they're undertaking – even if the courses are not eligible for fees-free payments, i.e. level 3 Youth Guarantee courses.

If the learner withdraws *before* your organisation's withdrawal date and you retain a fee, enter this dollar amount in the **Course Tuition Fees (GST Excl \$)** and **GST Charged on Course Tuition Fees** columns. You should enter 0 for the other fee columns. If you will report EFTS in the SDR against the course the student has withdrawn from you must also report these for fees-free.

For example, if a learner withdraws before your organisation's withdrawal date and you retain a withdrawal fee of \$500.00 including GST (where this is in accordance with the Education Act 1989):

- Enter \$434.78 in the **Course Tuition Fees (GST Exclusive \$)** column.
- Enter \$65.22 in the **GST Charged on the Course Tuition Fee** column.
- Enter 0 for all other fee columns.

An information guide for [how withdrawals work within the 2018 fees-free policy settings](#) is available on the TEC website. This includes the definition of a withdrawal and conditions for withdrawal dates.

Dates to diary...

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

Provider-based

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
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

Industry training

5 September	Fees-Free Report template and instructions sent to you via Workspace 2
12 September	Fees-Free Report due to TEC by uploading to Workspace 2
3 October	Fees-Free Report template and instructions sent to you via Workspace 2
10 October	Fees-Free Report due to TEC by uploading to Workspace 2
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

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.