



## Fees-free info sheet: Claiming retrospective fees-free support (payments)

This document sets out the time limit in which fees-free eligible learners can claim retrospective fees-free support (payments in respect of eligible fees-free learners).

This operational policy applies to learner's who have an 'unknown' eligibility status (but meet the eligibility criteria) and undertook eligible study or training in the 2018 calendar year.

### To be eligible for fees-free, a learner must meet the eligibility criteria and be undertaking an eligible course or industry training programme

To receive fees-free support learners must have a 'yes' eligibility status. If a learner meets the eligibility criteria but has an 'unknown' eligibility status, they're not able to receive fees-free support for any eligible study or training they undertake.

### A learner with an 'unknown' eligibility status can determine themselves as eligible by completing and submitting a statutory declaration form

The statutory declaration form needs to be submitted to the Tertiary Education Commission. Learners can do this on [feesfree.govt.nz](https://feesfree.govt.nz). Once received, we'll process the form to confirm their eligibility status. If the learner is eligible we'll update their eligibility status to 'yes.' The learner should then be included in future *Fees Free All Enrolments and Costs* returns.

### Learners must claim for fees-free support in the calendar year that their course or programme starts

If an unknown learner starts an eligible course or programme in 2018, they must complete and submit a statutory declaration form **prior to 31 December 2018** to receive fees-free



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support for the study or training. If the form hasn't been processed by 31 December, that's okay. The form just needs to have been submitted by 31 December.

If they don't, any eligible study or training undertaken in 2018 will count for consumption but the learner won't be entitled to have fees-free support for this study or training.

For example, a learner with an 'unknown' eligibility status undertook 0.5 EFTS at a cost of \$3,000 in the 2018 calendar year. They didn't submit a statutory declaration in 2018. The learner will still be considered to have consumed 0.5 EFTS and \$3,000 of fees-free support.

Further examples are included in the Appendix.

### **Even if a learner doesn't claim fees-free support and they are later determined to be eligible, they may still be able to carry forward some remaining fees-free entitlement**

This will depend on how many EFTS and dollars they incurred in the 2018 calendar year. Some learners may be entitled to carryover some entitlement into 2019.

For provider-based study, learners who **undertake less than 1 EFTS (120 credits) and use less than \$12,000 (including GST) of fees-free support** in the 2018 calendar year can carry forward their remaining fees-free entitlement (in dollars and EFTS).

For more information on carryover please see [Carryover settings for 2019](#) on the TEC website.

# Appendix: Scenarios

## Provider-based study

The following scenarios apply to learner's eligible for fees-free who have an 'unknown' eligibility status.

Scenario	As at 31 December 2018, amount of fees-free entitlement learner has consumed	Calendar year learner submits their statutory declaration	Is the learner entitled to receive fees-free support (payments) for eligible study undertaken in 2018?	Amount of fees-free entitlement learner has remaining to use in 2019 (or future years)
1	0.5 EFTS at a cost of \$4,000	2018	Yes	0.5 EFTS and/or \$8,000 – whichever cap the learner reaches first.
2	1 EFTS at a cost of \$7,000	2018	Yes	N/A – learner has undertaken 1 EFTS so is not entitled to carry forward any remaining fees-free entitlement.
3	0.875 EFTS at cost of \$5,000	2019	No	0.125 EFTS and/or \$7,000 – whichever cap the learner reaches first.
4	1 EFTS at a cost of \$9,000	2019	No	N/A – learner has undertaken 1 EFTS so is not entitled to carry forward any remaining fees-free entitlement.