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Kia ora!

Welcome to the last Fees Free newsletter for 2019. It has been a busy year, and as the year draws to a close, we want to say thank you for your continued efforts and engagement in implementing the Fees Free policy. We look forward to continuing to work with you in 2020.

In this edition, we bring you tips and information to help make Fees Free easier for you and our learners, including:

- Reporting on learner enrolments for 2019
- Withdrawal rule change
- Looking ahead to reporting in 2020
- Fees Free website has a mini makeover
- Reporting schedule to April 2020
- Tertiary Education Commission (TEC) Christmas hours.

Please encourage all those working on Fees Free enrolments and reporting in your organisation to subscribe to this newsletter and receive updates directly.

[Click here to subscribe](#)

If you would like to view Fees Free newsletters from previous months, they are on the [TEC website](#).

Remind learners to check their eligibility status on the Fees Free website

We want to make sure that no eligible learner is missing out on their fees-free entitlement. So it's important to **advise all learners** (including school leavers) enrolling at your organisation to check their eligibility status by entering their NSN on the Fees Free website at feesfree.govt.nz.

If a learner has an 'unknown' eligibility status, and they know they meet the eligibility criteria, please advise them to complete and submit a statutory declaration as soon as possible so they can receive Fees Free for any eligible study or training they undertake.

Learners must submit their statutory declaration by midnight 31 December 2019 to receive Fees Free for any eligible study or training they undertook in 2019.

Final chance to report learner enrolments for 2019

The *Fees Free All Enrolments and Costs* return to be completed by 22 January 2020 is the final opportunity you will have to report fees-free learner enrolments for 1 January 2019 to 31 December 2019. The information in the year end return is used to finalise your payments for the 2019 year. This may result in an additional payment, or recovery of a portion of the payment that we have already made to you. This approach is consistent with the processes undertaken for the 2018 calendar year. Please note the importance of ensuring your fees free year-end reporting matches your final December 2019 Single Data Return (SDR) too.

We can only include valid data in this final 2019 payment assessment. It is essential we work together, between now and the close of reporting (22 January 2020), to correct any errors that have been identified in your monthly *Fees Free All Enrolments and Costs Data Validation* report. For an enrolment (row of your reporting template) to be valid for payment at the end of the year, the following must be complete and correct:

- Eligible National Student Number
- Eligible Source of Funding
- Eligible Qualification Code
- Eligible Course Code
- Compulsory Tuition Fee and Compulsory Course Costs compared to STEO
- Course Tuition Fee GST calculation
- Compulsory Course Costs Fee GST calculation
- Student Services Fee GST calculation

- Course EFTS Factor compared to STEO
- Eligible Compulsory Student Services Fee, and
- Eligible from Date.

To increase the accuracy of your final *Fees Free All Enrolment and Costs* return, we recommend the following:

- Review the October (issued 29 October 2019) and November (issued 25 November 2019) *Fees Free All Enrolments and Costs Data Validation reports*, to identify any data validation issues.
- Read the *Fees-Free All Enrolments and Costs Data Validation Guide*, provided to your TEC Fees Free lead contact on 25 November 2019, to understand the cause of each data validation issue and high-level actions available to remedy the issue.
- Perform corrective actions, as necessary, to enhance the accuracy of your existing enrolment and cost data.

Please email the Customer Contact Group, customerservice@tec.govt.nz, if you have any questions or are looking to better understand the cause of your data validation issues.

Withdrawal rule change

From 1 January 2020, we will make a slight change to how we calculate the early withdrawal date for a learner for SAC Level 3 and above funding. We will not apply this change retrospectively.

Current requirements are:

- A. You may set a withdrawal date – the date being the specified period during which a student can withdraw and receive a full refund of fees, course costs and compulsory student service fees, provided the date is not earlier than the Withdrawal date in point (B).
- B. If no withdrawal date is set, then we calculate the withdrawal date as the date on which 10% or one month of the course for which a student is enrolled has passed, whichever is sooner.

The rule change only applies to point (B) and the 10%, of course duration calculated date.

Previously, TEC would round up or down to the nearest number of days based on the result of the 10% calculation. For example: 11.4 days became 11 days, and 11.5 days became 12 days.

We are now changing the calculation date to bring it in line with other TEC funding methodologies.

The new method will round up to the nearest number of days only. For example: 11.1 days becomes 12 days. The early withdrawal rule states that learners must withdraw before the limit. Therefore, if the limit is 12 days, all learners calculated in the 11 day range are rounded up to the limit of 12 days and are excluded as early withdrawals.

To gauge the affect this change would have on students we analysed withdrawal data. The analysis shows that of 16,000 withdrawals so far, this change would affect 0.8% of learners. Those few learners would be excluded as early withdrawals, and fees would be charged against their fees free entitlement.

With the change coming into effect from 1 January 2020, we ask that you clearly communicate the early withdrawal dates of courses to your learners.

Looking ahead to reporting in 2020

Your first 2020 *Fees Free All Enrolments and Costs* return is due in February 2020. The return includes:

- courses which start in 2020, and
- for all learners within the 2020 eligibility file noted as:
 - Yes (Y)
 - 2018 Starter (8) or
 - 2019 Starter (9).

The type of information you will provide in 2020 will not change, nor will the way in which you submit the data to us.

Changes for 2020 Fees Free All Enrolments and Costs returns

From February 2020, we are streamlining the *Fees Free All Enrolments and Costs* returns and processes to focus on the accuracy of the data:

- **We will not allocate fees-free payments** where we identify an enrolment (row of your reporting template) with No (N), Query or Error on one or more of the validation tests performed. This is consistent with the requirements for your year-end *Fees Free All Enrolments and Costs* returns (as noted above in 'Final chance to report learner enrolments for 2019').

- If a course is submitted with a validation error, we will only allocate fees-free payments in subsequent *Fees Free All Enrolments and Costs* returns when the data has been updated and no validation errors are identified.
- We will allocate Fees Free payments for courses where no validation errors are identified. If a learner has enrolled in multiple courses (rows of your reporting), only the course(s) (row of your reporting) that have data validation errors will be excluded from fees-free payments.

Many of the existing processes will not be affected. For example:

- We will continue to provide *Fees Free All Enrolments and Costs Data Validation* and *Fees Free Multiple Providers and Cap Limit* reports through WorkSpace2 after each reporting round. We will distribute these reports and the supporting applicable guides to your TEC Fees Free lead contact.
- The information to be reported in 2020 will not change, nor will the manner in which you report your data to us.

We believe this is a timely change. As mentioned above we will not allocate fees-free payments if data validation errors are identified in the final 2019 year-end *Fees Free All Enrolments and Costs* return (this is consistent with the approach to date). We will continue to work with you in 2020 to improve the quality of enrolment and course data you report to us and reduce the number of validation errors.

The change will also help you to forecast your cash flow by:

- improving certainty over the fees-free payments we allocate for each learner every month
- reducing the impact of payments, recoveries and requests for additional data in coming years.

Fees Free website has a mini makeover

Recently, we made minor adjustments to the Fees Free website (feesfree.govt.nz) to improve usability of the site and for prospective learners to further understand the eligibility criteria and benefits of Fees Free. The changes which we mentioned in the [November newsletter](#) are based on comments we receive from you and prospective learners. Thank you for your ongoing feedback as we continue to work together to improve fees free resources for the benefit of learners.

TEC Christmas hours

With the end of year rapidly approaching, those long-awaited Christmas holidays are finally on the horizon! The TEC will close on 24 December at 1.00pm, and will re-open on Friday 3 January. We will be sending out the next Fees Free newsletter in February 2020.

Reporting

Reporting information not reaching the right person?

Please email the Customer Contact Group at customerservice@tec.govt.nz if you need a staff member added as a Fees Free data return contact for your organisation. Please include their name, job title and email address. Your organisation can have more than one data return contact.

Reporting schedule

For providers

11 December 2019	Final 2019 fees-free report template and instructions available via Workspace 2
31 December 2019	Extract date for the Final 2019 fees-free report
22 January 2020	Final 2019 fees-free report due to TEC by uploading to Workspace 2
12 February 2020	February 2020 fees-free report template and instructions available via Workspace 2
13 February 2020	Extract date for February 2020 fees-free report
19 February 2020	February 2020 fees-free report due to TEC by uploading to Workspace 2
11 March 2020	March 2020 fees-free report template and instructions available via Workspace 2
12 March 2020	Extract date for March 2020 fees-free return
18 March 2020	March 2020 fees-free return due to TEC by uploading to Workspace 2

For industry training organisations

8 January 2020	December 2019 fees-free return due to TEC by uploading to Workspace 2
6 February 2020	January 2020 fees-free return due to TEC by uploading to Workspace 2
5 March 2020	February 2020 fees-free return due to TEC by uploading to Workspace 2

Contact us

If you have any questions or comments about this newsletter, or any other Fees Free queries, please contact the Customer Contact Group at customerservice@tec.govt.nz or 0800 601 301.



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customerservice@tec.govt.nz

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