



## Standard Operating Procedure

### Learner Fees – Definitions and Schedules

(November 2018)

In relation to policy *MP0354 Learner Fees* the following definitions and schedules apply.

Refer also *MP0354b Learner Fees\_SOP002 Form – Learner Discount Request Form*

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#### Other Definitions

Domestic Learner	<p>Australian citizens, permanent residents of New Zealand or Australia and learners from the Cook Islands, Niue and Tokelau who are New Zealand citizens, are normally eligible to enrol at the Otago Polytechnic under the same conditions as New Zealand learners, and at the same level of fees.</p> <p>Domestic learners may be resident in New Zealand or overseas, with the exception of New Zealand permanent residents and Australian citizens or permanent residents.</p> <p>A learner, including an international learner, that meets the criteria for "domestic student" specified in the Education Act 1989, and the relevant determination of design of funding mechanism issued by the Minister for Tertiary Education.</p> <p>For further information and funding rules for Domestic Learners refer to number 5.1 section D <a href="https://www.tec.govt.nz/funding/funding-and-performance/funding/fund-finder/student-achievement-component-provision-at-level-3-and-above-on-the-nzqf-fund/conditions-2018/">https://www.tec.govt.nz/funding/funding-and-performance/funding/fund-finder/student-achievement-component-provision-at-level-3-and-above-on-the-nzqf-fund/conditions-2018/</a></p>
External Fee	<p>A fee component which is set by an external agency and collected by Otago Polytechnic on their behalf as part of the Student Fee (e.g. City and Guilds examination fees, NZQA credit fees, etc.).</p>
Fee Components	<p>Any charge made for enrolment in a course or programme, and which are deemed to form part of the Student Fee, as approved by inclusion in Schedule of Fee Components (Appendix C).</p>
Fee Rules	<p>TEC sets limits on fees that TEO's can charge learners. The policy applies to domestic learners only and is applied at the course, not programme level.</p>
Loanable Fees	<p>Loanable fees are available on programmes that have been approved for student loans and/or allowances by the Ministry of Education. Learners must meet the approved criteria set by the Ministry of Education.</p> <p>The fee components for which the learner may seek a loan from StudyLink. (Learners may also seek loans for up to \$1,000 for non-compulsory course related costs, including non-compulsory fees.) Fees are loanable if and only if they are compulsory.</p>
Non compulsory Fees	<p>Fee Components that are not compulsory.</p>
SDR Reportable	<p>A fee component that is reported to the Ministry of Education. Such fees for a particular course are summed, and the total SDR reportable fee is reported to the Ministry as part of the Single Data Return (SDR), to allow the Ministry to ensure that fees, at course level, have not increased.</p>

International Learner	International learner means a person who: <ul style="list-style-type: none"> <li>a) is enrolled by a provider, <b>and</b></li> <li>b) is studying in New Zealand on a student permit under the Immigration Act 1987, <b>and</b></li> <li>c) in relation to the provider, is a foreign student as defined in Section 2 or Section 159 of the Act (whichever is applicable). <i>(Extract MOE, Education (Pastoral Care for International Students) Code of Practice 2016 or</i></li> <li>d) is enrolled in a course of study at Otago Polytechnic but is permanently based overseas, other than New Zealand Citizens or Permanent Residents.</li> </ul>
Full Time International Learner	Learners who enrol in a Path of Study of at least 80% of the Programme EFTS for a year. They pay the approved flat fee. The only variation to this is AIC enrolments which are by course and therefore pay the aggregate of all course fees.
International - Variation of Conditions "other than Full Time study"	Learners who enrol in less than 80% of the Programme EFTS for a year. A fee for each course enrolled into is required and is calculated on a pro rata basis by course EFTS as a proportion of the Programme EFTS for a year.  Part-time study will only be allowed as an exception to normal Immigration Policy if there are special/exceptional circumstances surrounding the application. If this exception is allowed, NZIS would then look at whether the person should hold a learner permit or a visitor's permit with a variation of conditions (VoC).
International - Programme EFTS (Equivalent Full Time Student)	The EFTS load for the normal enrolment in that programme in that year, as per the approved programme document (usually 1.000 for one year, but may be 0.5000 for half year).
International - Full Time plus additional courses	An International learner enrolling in more than 105% of Programme EFTS for a year will pay the flat fee and an additional fee based on the Part Time fee for the additional courses chosen.

## Domestic Learners

1. For domestic learners a Student Fee Schedule which lists Publishable Fees for all programmes is freely available to staff <J:\Shared\FinancialReports\Fees\Fees 2019\Domestic\2019 Domestic Indicative Approved Fees.xlsx>
  - 17.1. Fees are set at course level and the total student fee payable by a learner in a programme will then be the total sum of all course fees payable, plus any programme level components and other one-off items.
  - 17.2. Information on fees are to be clear about whether there are any additional fees (e.g. optional field trip) not included in the Publishable Fee. Where the Publishable Fee does include an atypical item (e.g. knives, compulsory field trip), these are to be clearly stated.
18. Publishable Fees are to be for a learner enrolling in the approved EFTS value for that programme for that year. However, the actual fee payable may differ from the Publishable Fee depending on courses chosen and should be denoted 'indicative'. A caveat to that effect must accompany all written and verbal information on fees. The wording should be "The maximum fee payable under TEC Fee rules will be \$XXX however the actual amount payable may vary depending on courses selected within the programme."
19. The Tuition Fees for the same programme at different locations, or by different delivery methods, are generally to be the same, with the exception being online learning via TANZ e-campus.
20. To minimise barriers for learners, as much of the Student Fee as possible is to be Compulsory, and therefore loanable. Refer to Studylink website for eligibility for loans and allowances, StudyLink <https://www.studylink.govt.nz/>
  - 20.1. To qualify as full time, StudyLink currently requires enrolments of 0.8 EFTS for full year full-time, 0.4 EFTS for full-time one semester. Anything less than this may qualify for 'Limited Full-time' status (refer to policy *AP0504 Application Entry and Enrolment*)
21. **Discounts (Domestic):**
  - 21.1. Discounts may only be offered on specific course(s), programme(s), or an occurrence(s), with prior approval of the Deputy Chief Executive Corporate Services or delegate.
  - 21.2. If discounts are offered for an occurrence these must be authorised for each enrolment period and reauthorised for any subsequent enrolment period

21.3. Discounts may also be offered to individual learners with approval of the Deputy Chief Executive Corporate Services or delegate using the discount form *MP0354b Learner Fees\_SOP002 Form – Learner Discount Request Form*.

- a. Once completed the form needs to be submitted to Registry with the Learner's Enrolment Form and Study Contract.
- b. The learner is then enrolled by Registry as if paying the usual course fees and a credit will be issued for the amount of discount along with a statement showing the total amount of fee still to be paid. It is important for Student Loan purposes that the invoice and credit are completed at the same time.

21.4. Discounts on courses/programmes are available to staff members, OP council members and registered Alumni through policy *MP0454 Staff Discount on internal OP programmes/courses*;

Note: learner, alumni, staff and OP council member discounts cannot be used together for the same enrolment event.

## 22. Other non standard cases:

22.1. Non-standard cases may arise (such as "assessment only" enrolments). In all such cases, both the case itself and the relevant fees must be approved in writing by the Deputy Chief Executive Corporate Services or delegate prior to enrolment.

## 23. Payment of fees (Domestic)

23.1. All fees should, where possible, be paid within 14 days of the date of the invoice and no later than the programme start date, or an arrangement made for payment with the Senior Financial Advisor.

- a. By signing the enrolment form the learner is agreeing to pay the applicable course fees of the course or programme that they are enrolling into. **Learners who have not paid their fees in full or made an arrangement by the due date cannot attend classes.**
- b. It is the responsibility of the Head of School/College in consultation with the Senior Accounts Officer to assist in managing this.

23.2. Payment methods include EFT POS, cheque, credit card, internet banking or learner/student loan. Cash is not a preferred payment method and cash payments over \$500 will not be accepted at Customer Services. Bank deposit slips are available at Customer Services for learners to take the money and the deposit slip to the Westpac Bank and pay their fees directly into the Otago Polytechnic account, or learners can take the deposit slip to their own bank for payment of their fees by transfer to Otago Polytechnic.

23.3. Where a learner arranges payment of their fees by instalment a \$50 GST inclusive administration fee applies and may be included in the total amount owing.

23.4. Where fees are paid by credit card the service charge for the transaction may be added to the total cost to be paid by the learner.

23.5. Failure to pay any invoice(s) by the due date will mean the learner is liable for all costs and expenses including legal costs, debt collection and agent fees which may be incurred in the recovery or attempted recovery of the overdue amount.

23.6. Academic Results for a learner will be withheld from any courses/ programmes where fees or any other debt remains unpaid. Learners will be prevented from graduating or receiving their awards until the debt has been cleared or a payment plan agreed with the Senior Accounts Officer.

23.7. Learners with any debt will only be able to enrol in further courses of study with prior approval of the Deputy Chief Executive Corporate Services or delegate.

23.8. No learner who has applied to StudyLink for a student allowance shall have an approved verification of study returned to StudyLink unless the full fees have been paid or a loan verification of study request has been received from StudyLink, and approved.

24. **Student Services and Student Health Levies** are chargeable as an annual fee. The charge applies whenever a learner enrolls in a course / courses / programme of greater than 20 credits at any given time.

24.1. Application of the levies is therefore considered for each enrolment event and not aggregated over the year, and exempted/reduced in certain circumstances (refer to Schedule of Nil Fee Programmes). For example, where part-time learners enrol in individual courses of 20 or fewer credits each at different times throughout the year, although collectively the enrolments may exceed the threshold, the levies will not apply. These learners can access Student Health and Counselling on a fee for service basis.

## International Learners

1. The International Tuition fee is set taking account of the market, relative to structures for domestic learners and any additional international charges.
  - 1.1. The Director: Global Engagement in conjunction with Otago Polytechnic Auckland International Campus (OPAIC) arranges on an annual basis to assess, research, consult, develop a fee calculation and distribution formula and make recommendation to Executive Leadership Team and Otago Polytechnic Council for the following year.
  - 1.2. The fee calculation formula is made available for ongoing and/or one off fee assessments that are necessary to be made during the course of a year, and reflects the fee components as outlined in Schedule of Fee Components.
2. The cost of tuition and all other Course-Related Costs must be provided to the prospective International Learner before they enter any commitment so that there are no substantial hidden costs as per The Education (Pastoral Care of International Students) Code of Practice 2016.
3. The annual or programme fee published in New Zealand \$ is for the year of publication and may change in subsequent years. A disclaimer will be published with the fee information to prospective International Learners. This disclaimer will read *"Fees shown are approximate only, subject to change and exchange rates. Otago Polytechnic reserves the right to alter and amend information and withdraw programmes without notice"*, or similar.
4. The Tuition Fee is calculated and published as a Flat Fee for each programme, course or module.
5. Additional fees to the Flat Fee may be introduced during this process. These may include an enrolment fee, late payment fee, deferral fee, terms carried over fee, instalment administration fees and export education levy.
6. **Payment of Fees (International)**
  - 6.1. All fees are inclusive of GST (NZ Goods and Services Tax) and will be in NZ\$. Where an International Learner underpays the Published Fee due to exchange rate fluctuations the learner will be required to pay the difference to meet the NZ\$ fee amount in the same way as any other learner or debtor. The converse is also true, an overpayment due to exchange rate fluctuations will be refunded to the learner in NZ\$ in the same way as any other learner or debtor.
  - 6.2. Where fees are paid by credit card the service charge for the transaction may be added to the total cost to be paid by the learner.
  - 6.3. We accept a number of payment methods including EFT POS, cheque, credit card, internet banking or learner/student loan. Cash is not a preferred payment method and cash payments over \$500 will not be accepted at Customer Services due to the risk posed to the paying learner and Otago Polytechnic staff. Bank deposit slips are available at Customer Services for learners to take the money and the deposit slip to the Westpac Bank and pay their fees directly into the Otago Polytechnic account, or learners can take the deposit slip to their own bank for payment of their fees by transfer to Otago Polytechnic.
7. In order to meet Otago Polytechnic enrolment requirements, International Students must be enrolled in a full-time course of study. Students must be enrolled full-time (greater than 0.8 EFTS) to enable them to complete the course in the minimum completion time. Part-time study will only be allowed as an exception to normal immigration policy if there are special/ exceptional circumstances surrounding the application. If this exception is allowed, New Zealand Immigration Service (NZIS) would then look at whether the person should hold a Student Permit or a Visitor's Permit with a Variation of Conditions (VoC).
  - 7.1. Should an International Learner's degree programme require less than full enrolment for completion in the final year of study, an exemption from NZIS can be applied for.
8. International Learners taking papers for "interest only" or as "additional papers" are required to pay a pro-rata full International Fee according to the EFTS value of the course.
9. **Enrolment by International Learners in Short Courses.**
  - 9.1. Otago Polytechnic interprets NZIS rules as follows: A person resident in New Zealand but without permanent residency status (for example on a work visa) is able to enrol in 1 or more campus based short courses for a period less than 3 months if you hold a work visa (or less than 6 months if you hold a working holiday visa), without varying the conditions of your visa and charged as an International Learner. To do other studies for more than 3 months, or study consecutive courses that last longer than 3 months in total, such person will be required to apply for a variation of visa conditions and/or change of status to a student visa before re-enrolling. On verification of obtaining permanent residency they will become eligible to be a Domestic Learner.

Refer to <https://www.immigration.govt.nz/new-zealand-visas/already-have-a-visa/my-situation-has-changed/work/can-i-study-part-time-while-working>

9.2. Wholly distance mode programmes, Australian citizens, Australian permanent residents and New Zealand permanent residents who do not reside (domiciled) in New Zealand for the duration of their study will be deemed to be International Learners and charged International Fees.

10. An International learner's enrolment is not confirmed until all fees are paid, except where discretion is applied.

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### Schedule of Nil Fee Programmes

<b>Responsible School</b>	<b>Approved Programmes and Courses with Zero or Nil Fees in addition to or in place of a standard approved fee</b>
CDP	Computing 4 Free
Various	Youth Guarantee Enrolments as applicable
	Central Otago Trades Academy as applicable
	L1 & L2 qualifications (free fees for learners with no existing L2 qual)
	He Toki training programmes

## Schedule of Fee Components - Fees Rules

Order	Fee Components	Description	Fees set by	Who gets the collected fee	What does it cover	Maximum payable	Compulsory	Exemptions***	Include in publishable fee?	Included in AMFM value	Multiply by EFTS factor	Refundable	Loanable	SDR reportable?	Scenario Control Amount \$				
															International		Domestic / Location		
															International	AIC	Dunedin	Central Otago	Distance
1	Tuition Fee	Course related component, balance of total publishable fee minus other compulsory relevant fee components	OP	OP School	Delivery costs	N	Y	N	Y	Y	Y	Y	Y	Y			Same amount as Dunedin based rate for all locations		
2	Student Health	Student Health & Counselling Levy	OP	OP Student Health / Counselling	Student Health & Counselling services	yes, as per scenario control	Y	Y for CLC courses and < 20 Credit courses and Capable NZ candidates and domestic CAP students	Y	N	N	Y	Y	N	215	0	215	215	0
3	OP Student Services	OP Student Services Levy (now OP and OPSA combined)	OP	OP	Student support services, Unipol, clubs and Socs, plus services provided to learners on behalf of Otago Poly	yes, as per scenario control	Y	Y for CLC courses and < 20 Credit courses and Capable NZ candidates and domestic CAP students	Y	N	N	Y	Y	N	as location	0	426	346	251
4	ID Card	OPSA Identification Card. Once per learner per year	OP	OP	Purchase of ID card	\$15 once per year	Y	for zero fees courses, and by Customer Services and/or OPSA approval ****	Y	N	N	N**	Y	N	15	15	15	15	15
5	NZQA Credit Fees *	NZQA Unit Credit Fee - \$1.58 per credit per unit	NZQA	NZQA	NZQA Unit Credit Fee - \$1.58 per credit per unit	equals no of credits taken	Y	N	Y	N	N	Y*	Y	N	0	0	\$1.58 per unit Credit		
6	NZDIP Business Exam Fees *	Fee charged for NZDIP Bus exam fees \$10.20 per exam - plus \$2 commission	NZQA	NZQA	NZDIP Business Exam Fees *	depends on no of papers taken	Y	N	Y	N	N	Y*	Y	Y	0	0	\$12.20 per exam – including \$2 commission		

7*	Exam Fees (other than NZQA unit credits)	Fee charged for exams other than NZQA and Dip Bus exam fees		Exam body	Exam Fees (other than NZQA unit credits)	As per rules of exam body	As required by course	N	Y	N	N	Y*	Y	Y if and only if compulsory	As per external authority changes / rules
8	Purchasable Items (e.g. knives)	School of Hospitality use this to collect monies for purchasable items such as knives	OP	OP School	Purchasable Items (e.g. knives)	N	As required by course	N other than by discount clause	Y	Y	N	Y	Y	Y if comp	Changes at different sites must be approved by HoS
9	Other purchasable items	Any items which the learner pays Otago Polytechnic for, sometimes referred to as 'course related costs'	OP	OP School	Other purchasable items	N	As required by course	Y if course requires it to be bought from OP	N	N	N	Y	N	N	As required by course
Note:	Gown hire is a separate charge and is not part of the Student Fee.														
*	Refundable only if payment not already made to the external body by Otago Polytechnic on behalf of the learner.														
**	Refundable unless ID card already issued - \$15 covers the costs not the benefits.														
***	Where exemptions exist in this column they override the compulsory classification.														
****	Where a learner is enrolling in a part time short course no ID Card charge will be made unless requested by the learner or school. Any learner not charged for an ID Card but who wishes to obtain one can request one directly.														