



## Fees-free info sheet: Carryover settings for 2019

This document sets out how the carrying forward of remaining fees-free entitlements works.

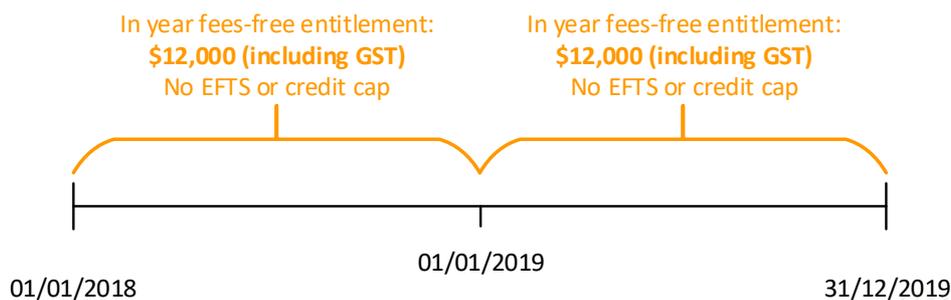
### Providers

#### Fees-free entitlements

**In a calendar year fees-free support is capped at \$12,000 (including GST) per learner**

- › There is no equivalent full-time student (EFTS) or credit cap.
- › So a learner eligible for fees-free can receive up to \$12,000 (including GST) of fees-free support for any eligible provider-based study they undertake in the calendar year (see Figure 1).

**Figure 1: In year fees-free entitlement**



**Eligible learners cannot opt to pay fees in 2018 and “bank” their fees-free entitlement for future use**

If a learner is eligible for fees-free study and is undertaking eligible study, they’re automatically using their fees-free entitlement. You’re required to report all these learners in your monthly *Fees Free All Enrolments and Costs* returns.



We ensure New Zealand’s future success.

If a learner has an unknown eligibility status but meets the eligibility criteria they should complete and submit a statutory declaration **as soon as possible**.

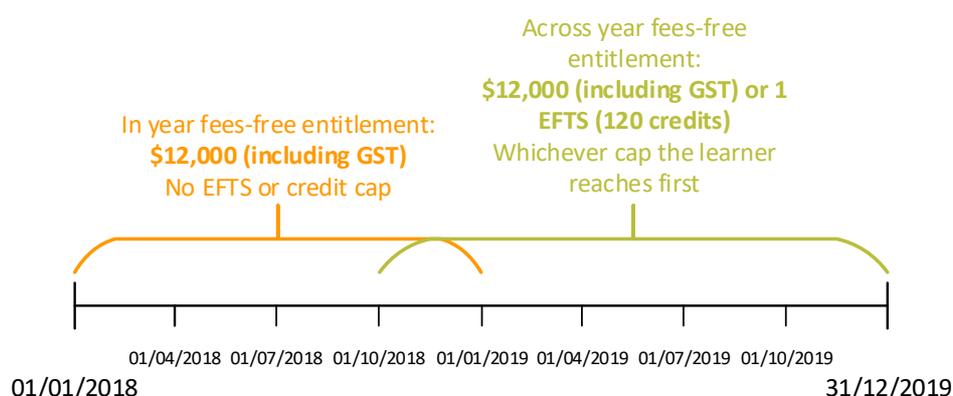
To access a statutory declaration, learners need to go to [www.feesfree.govt.nz](http://www.feesfree.govt.nz) and enter their National Student Number (NSN).

## Carrying forward of fees-free entitlement (carryover)

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).

Eligible learners are entitled to up to \$12,000 (including GST) of fees-free support or fees-free support for up to 1 EFTS (120 credits) – whichever cap the learner hits first. A learner’s entitlement will stop when they reach either \$12,000 (including GST) or 1 EFTS.

**Figure 2: Across year fees-free entitlement**



### Carryover is based on calendar years

Based on use to 31 December each year we’ll calculate how much eligible learners (who have undertaken eligible study in the year) have consumed (EFTS and dollars). As a result, carryover amounts won’t be confirmed until early 2019.

### Provider-based carryover examples

Usually, 0.125 EFTS is equivalent to 15 credits or points.

| Credits and EFTS used in 2018 | Fees-free support used in the 2018 calendar year | Does the learner have carryover? | How much carryover is the learner allowed in 2019 (or future years)?  |
|-------------------------------|--|----------------------------------|---|
| 30 credits (0.25 EFTS)        | \$1,600  | Yes                              | 90 credits (0.75 EFTS) and up to \$10,400.<br><br>The learner’s fees-free support will stop when they use either 90 credits or \$10,400 – whichever is used up first. |
| 60 credits (0.5 EFTS)         | \$4,000  | Yes                              | 60 credits (0.5 EFTS) and up to \$8,000.  |

|                          |          |  |  |
|--------------------------|----------|--|--|
|                          |          |  | The learner's fees-free support will stop when they use either 60 credits or \$8,000 – whichever is used up first. |
| 105 credits (0.875 EFTS) | \$12,000 | No – they have reached the dollar cap.           | N/A  |
| 120 credits (1 EFTS)     | \$8,000  | No – they have reached the EFTS cap.             | N/A  |
| 135 credits (1.125 EFTS) | \$12,000 | No – they have reached the EFTS and dollar caps. | N/A  |

## Industry training

### Fees-free entitlements

Eligible learners that commence their industry training programme in the 2018 calendar year are eligible for their fees to be paid for the first 24 months of the training programme.

## Learners who have undertaken both provider-based study and industry training

We'll check whether the learner has used:

1. 1 EFTS
2. \$12,000 (including GST)

and/or

3. 24 months (of industry training).

If a learner **hasn't** reached any of the above caps, they can carry forward their remaining fees-free entitlement.