

OTAGO POLYTECHNIC MANAGEMENT POLICY		Number: MP0354.07
Title:	Student Fees	
Baldrige Criteria:	6 Operations	
Chief Executive Approval:	Approval Date: 5 December 2016	Effective Date: 5 December 2016
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Contact Authority:	Chief Operating Officer	Status: Current

Purpose To provide policy and procedures for the setting, review and management of fees for students enrolling at Otago Polytechnic.

To ensure that all student fees are established in a controlled and timely fashion.

Definitions See Appendix A

Background Fees are paid by students as a condition of enrolment into courses and programmes. The Publishable Fee may include charges for such things as ID cards, Student Service Levies and NZQA credit fees, in addition to some course related equipment and field trips.

All programmes offered and promoted for enrolment by International Students must quote a full cost Flat Tuition Fee for payment in advance by the student. These fees are established in consultation with senior management and schools and must reflect export education market rates for competitive advantage. The fees are published as annual, semester or term fees according to the length of the programme and may change from year to year.

It is important to note for budgeting purposes that:

- Once a Publishable Fee is set, any increase to the cost of compulsory items (such as tests, field trips) within the Publishable Fee, means less remains for the Tuition Fee.
- Fee calculations should be GST exclusive even though all Publishable Fees are GST inclusive.

National Guidelines Funding Rules Tertiary Education Commission (TEC)
StudyLink Regulations - Export Education Levy
Education (Pastoral Care of International Student) Code of Practice 2016

Policy GENERAL

1. Council approves fees.
2. All fees are to be authorised in accord with the policy and procedures prior to entry to the Student Management System (SMS) and prior to any form of publication or notification to students or others.
3. Fees are to be set at fair market rates, and in accord with any Tertiary Education Commission rules or policies.

All fees information to prospective students, whether verbal or in writing, are to be GST inclusive.

4. Fees will be authorised in sufficient detail so that all components at both programme and course level comply with agreed rules as set out in the Schedule of Fee Components (Appendix B).

Charges for field trips, personal equipment and the like may be authorised as part of the Student Fee. Provision for such inclusion will be made in the Schedule of Fee Components (Appendix B).

5. Any charges to students which are not on Appendix B are not deemed part of the Student Fee, and are not covered by this policy. This exclusion does not apply to the withholding of student academic results as per 'Procedures - Domestic' clause 9.
6. Deposits are not to be charged to students for the purposes of securing a place in any Otago Polytechnic programme or course, or for any other reason.
7. Fees for the following year will be set as early as possible in the preceding year. This will usually be dependent on the TEC fees policy release.
8. Assessment of Prior Learning fees are excluded from this policy.
9. All programmes and courses have a fee attached to them which is paid by the student or other funding entity. Those programmes specifically listed in Appendix C have the fees waived. Additions or amendments to this Appendix are to be made by Finance and may only be approved by the Chief Executive, or Chief Operating Officer.
10. Any domestic or international student who wishes to dispute the fees owing must do so within one month of receiving the notification (invoice or statement) showing the outstanding amount. A request to review the outstanding amount must be made in writing to the Registry Team Leader, Otago Polytechnic, within the specified time period. There is discretion to accept reviews lodged outside the normal one-month time limit if Otago Polytechnic considers that there was good reason for the delay. The review should be completed within seven working days of the date of receipt of the application for review. Any outstanding monies owing at the outcome of the review are to be paid to Otago Polytechnic immediately once notification is received.
11. International students who are still not satisfied following a review can make a complaint to iStudent complaints, complaints@istudent.org.nz

Policy and Procedure - DOMESTIC

1. Fees for the following year will be authorised by the following procedure:
 - 1.1. Council approves fees. A schedule containing the development of rules will be attached to this policy for the coming year. Finance staff prepare a new Schedule of Fee Components (Appendix B). This Schedule lists all Fee Components which may be included in the Student Fee in the following year.
 - 1.2. For each programme, including short courses, Finance staff, in consultation with Marketing and designated school staff (where appropriate), determine the Publishable Fee.
 - 1.3. A Student Fee Schedule which lists Publishable Fees for all programmes is to be prepared as a schedule freely available to staff.
 - 1.3.1. Fees will be set at course level and the total student fee payable by a student in a programme will then be the total sum of all course fees payable, plus any programme level components and other one-off items.
 - 1.3.2. Information on student fees is to be clear about whether there are any additional fees not included in the Publishable Fee. For example, "The fee is \$4,000 and there is also an optional field trip which will cost an additional \$300."
 - 1.3.3. Where the Publishable Fee does include an atypical item, these are to be stated. For example, "The fee for this programme is \$4,000, which includes a set of knives and a field trip."
2. The Schedule of Approved Fees will then be entered into the SMS, and may also be otherwise published.

3. Publishable Fees are to be for a student enrolling in the approved EFTS value for that programme for that year. 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."
4. In general, the Tuition Fees for the same programme at different locations, or by different delivery methods, are to be the same.
5. To minimise barriers, as much of the Student Fee as possible is to be Compulsory, and therefore loanable. NB StudyLink has an EFTS threshold for Student Loans.
6. Fees struck at any time after the above has been completed will be approved by the Chief Executive or Chief Operating Officer.

7. Discounts

- 7.1. Discounts may only be offered to students enrolling into programmes/courses with prior approval of the Chief Operating Officer or delegate.
- 7.2. Discounts may be for an individual student, course(s) or a programme.
- 7.3. If discounts are offered for an occurrence these must be authorised for each enrolment period. Any discounts offered for an occurrence only apply to that occurrence in that year and must be reauthorised for any subsequent enrolment period.
- 7.4. Discounts are available to staff members through policy MP0454 Funding for Staff Development Activities and Staff Discount; however student and staff discounts cannot be used together for the same enrolment event.
- 7.5. Registered Alumni have access to discounted OTCONT courses. Courses are free* if they are in the same or equivalent qualification to the one previously awarded, for other OTCONT courses there is a 15% discount. When a registered alumni enrolls in another qualification 2 years or more after completing the previous qualification a 15% discount applies.

*Alumni cannot accumulate free courses to get a new qualification. A maximum of 2 free courses can be credited to a new qualification.

7.6. Discount Procedure

- 7.6.1. The Enrolment Form and Study Contract, and either a Student Discount Form, or Staff Discount Form, or evidence of Alumni registration is required to process discounts.
- 7.6.2. The student is enrolled by Customer Services 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.

8. Other non standard cases

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 Chief Operating Officer prior to enrolment. The method of handling in the SMS as above to be included.

9. Payment of fees

9.1. All fees must 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 Customer Services Team Leader. It is the responsibility of the Head of School in consultation with the Customer Services Team Leader to assist in managing this. By signing the enrolment form the student is agreeing to pay the applicable course fees of the course or programme that they are enrolling into. **Students who have not paid their fees in full or made an arrangement by the due date cannot attend classes.**

9.2. Fee payments by eftpos, credit card and bank transfer are preferred. Cash payment of any outstanding fee amounts greater than \$500 will not be accepted due to the risk posed to the paying students and Otago Polytechnic staff.

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

9.4. Where fees are paid by credit card the service charge for the transaction is added to the total cost to be paid by the student.

10. Failure to pay any invoice(s) by the due date will mean the student 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.

11. Academic Results for a student will be withheld from any courses/ programmes where fees or any other debt remains unpaid. Students will be prevented from graduating or receiving their awards until the debt has been cleared or a payment plan agreed with the Customer Services Team Leader. Students will be able to enrol in further courses of study with prior approval of the Chief Operating Officer.

12. No student 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.

13. Refund of fees

A separate policy covers fee refunds - *MP0351 Students Withdrawal and Refund Policy for Year XXXX*.

The Withdrawal and Refund Policy will be completed by 31 August in the preceding year to allow for the SMS to be set up accordingly.

Note that any administrative fees required to be charged under the Refund Policy will be deducted as the refund is processed and any remaining balance paid to the person or organisation that paid the original invoice in question.

14. Student Services and Student Health Levies

These levies (as per Appendix B) are chargeable as an annual fee. The charge applies whenever a student enrolls in a course/courses/programme of greater than 20 credits at any given time. Application of the levies is therefore considered for each enrolment event and not aggregated over the year, and exempted/reduced in certain circumstances as per Appendix B. For example, where part-time students 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 students can access Student Health and Counselling on a fee for service basis.

**Policy and
Procedure –
INTERNATIONAL**

1. The International Tuition fee is set taking account of the market, relative to structures for domestic students and any additional international charges.
 - 1.1. The Director: Communications arranges on an annual basis (August each year) to assess, research, consult, develop a fee calculation and distribution formula and make recommendation to senior management and Council for the international tuition fee for the year after the next (e.g. August 2014 for 2015 fee).
 - 1.2. The Director: Communications makes a recommendation to Leadership Team for Council approval.
 - 1.3. 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.
 - 1.4. The fee calculation formula reflects the Fee Components as outlined in Appendix B.
2. The cost of tuition and all other Course-Related Costs must be provided to the prospective International Student 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 must be published with the fee information to prospective International Students. This disclaimer reads '*Full cost tuition fees are assessed each year.*' .
4. The Tuition Fee is calculated and published as a Flat Fee for each programme, course or module.
5. Any additional sundry school fees information not included in the Flat Fee calculation is supplied to International Admissions.
6. 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
7. In general, the Publishable Fee for the same programme at different locations or by different delivery methods, including Distance Learning, are to be the same.
8. **Payment of Fees**
 - 8.1. All fees are inclusive of GST (NZ Goods and Services Tax) and will be in NZ\$. Where an International Student underpays the Published Fee due to exchange rate fluctuations the student will be required to pay the difference to meet the NZ\$ fee amount in the same way as any other student or debtor. The converse is also true, an overpayment due to exchange rate fluctuations will be refunded to the student in NZ\$ in the same way as any other student or debtor.
 - 8.2. Where fees are paid by credit card the service charge for the transaction is added to the total cost to be paid by the student.
 - 8.3. Fee payments by eftpos, credit card and bank transfer are preferred. Cash payment of any outstanding fee amounts greater than \$500 will not be accepted due to the risk posed to the paying students and Otago Polytechnic staff.

9. In order to meet 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).

9.1. Should a student's degree programme require less than full enrolment for completion in the final year of study, an exemption from NZIS can be applied for.

10. Students 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.

11. Enrolment by International Students in Short Courses.

11.1. 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 campus based short courses or study to a maximum EFTS value of 0.36 cumulatively and will be charged as an International Student. Upon reaching the threshold of 0.36 EFTS such person will be required to have a change of status to a student visa before re-enrolling. On verification of obtaining permanent residency they will become eligible to be a Domestic Student.

11.2. 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 Students and charged International Fees.

12. An International student's enrolment is not confirmed until all fees are paid, except where discretion is applied at Otago Polytechnic Auckland International Campus.

13. Refund of fees

Policy *MP0351 Students Withdrawal and Refund Policy for Year XXXX* covers fee refunds.

A separate policy covers fee refunds for International Students at Auckland International Campus - *MP0357 Cancellations, Withdrawals, Transfers and Special Assessments for International Students at Auckland International Campus*.

14. International Student complaints

Student complaints are covered by policy AP0603 Resolution of Student Complaints. International students who are still not satisfied following a review can make a complaint to iStudent complaints, complaints@istudent.org.nz

Referral Documents

MP0351 Students Withdrawal and Refund Policy for Year XXXX
AP0501 Recognition of Prior Learning
AP1003 Graduation
AP1005 Results for Consultancy/Workplace Assessment
AP1008 Student Results
MP0454 Funding for Staff Development Activities and Staff Discount
MP0357 Cancellations, Withdrawals, Transfers and Special Assessments for International Students at Auckland International Campus
AP0603 Resolution of Student Complaints

Approved by Chief Executive

Date: 5 December 2016



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Definitions

“Bundles to”	This is the fee component shown on the student’s receipt in which the particular charge is included, e.g. field trip ‘bundle to’ the School Fee. So the receipt will not identify field trip cost, which will be included in the School Fee.
Compulsory Fees	Fee components which cover items which the student must purchase as a condition for enrolment.
Course Related Costs	Unfortunate phrase (since all fees are course related) used by StudyLink for all student costs directly related to study. These costs include non-compulsory fees, as well as other costs which the student incurs. These costs may or may not be purchased from Otago Polytechnic.
Domestic Student	<p>Australian citizens, permanent residents of New Zealand or Australia and students 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 students, and at the same level of fees.</p> <p>Domestic students 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 student, including an international student, 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>
External Fee	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.).
Fee Components	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).
Fee Rules	TEC sets limits on fees that TEO’s can charge learners. The policy applies to domestic students only and is applied at the course, not programme level.
Flat Fee	Where the students in a programme all pay the same Publishable Flat Fee amount, even if there are differences in their course selection within that programme. The Flat Fee will include all the usual fee components.
Loanable Fees	<p>Loanable fees are available on programmes that have been approved for student loans and/or allowances by the Ministry of Education. Students must meet the approved criteria set by the Ministry of Education.</p> <p>The fee components for which the student may seek a loan from StudyLink. (Students 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	Fee Components that are not compulsory.
Publishable Fee	The compulsory fees at programme level for use where a single fee amount is published on the Otago Polytechnic website or in any advertisements, Prospectus, brochures and other publications. This fee is GST inclusive and is the total fee which the student pays to the Polytechnic.

SDR Reportable	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.
Tuition Fee	Course related component, balance of the total Publishable Fee minus the other compulsory relevant fee components. This fee comprises Compulsory and Non Compulsory fees, and may include Course Related Costs, OPISA and NZQA costs etc. See Appendix C.
International Student	International student means a person who: <ul style="list-style-type: none"> a) is enrolled by a provider, and b) is studying in New Zealand on a student permit under the Immigration Act 1987, and 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> d) is enrolled in a course of study at Otago Polytechnic but is permanently based overseas, other than New Zealand Citizens or Permanent Residents.
International Flat Fee	The purpose of the flat fee is to give certainty in the market place. So if \$15,000 is quoted, the fee paid is exactly that. This fee is to include all of the components contained in Appendix C. This means that components such as Student Services, NZQA Unit Credits, agents' fee, etc. if on Appendix C, are included. Any recognition of prior learning (RPL) fees will be absorbed within the flat fee.
Full Time International Student	Students 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"	Students 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 student 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 student 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.

Schedule of Fee Components 2015
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	GST incl	Multiply by EFTS factor	Refundable	Loanable	TIA Allowed	SDR reportable?	Bundles to	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	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	Y	N	Y	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 students 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	Y	N	Y	Y	Y	N		as location	0	426	346	251
4	ID Card	OPSA Identification Card. Once per student 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	Y	N	N**	Y	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	Y	N	Y*	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	Y	N	Y*	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	Y	N	Y*	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	Y	N	Y	Y	Y	Y if comp	School	Changes at different sites must be approved by HoS	
9	Other purchasable items	Any items which the student 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	Y	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 student.
**	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 student is enrolling in a part time short course no ID Card charge will be made unless requested by the student or school. Any student not charged for an ID Card but who wishes to obtain one can request one directly.



Schedule of Nil Fee Programmes

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

Last updated 2 November 2016

Student Discount Request Form

(Use for individual and/or group discount requests. Group discounts attach list)

Student Name and ID (if applicable):

School:

Programme:

Course/s: Commencing
 (List all courses) (Start dates must be in the current year)

Occurrence:
 (List all courses)

Full Fee: \$ e.g.: \$1000

Less resource costs etc.: \$ e.g.: \$100

Total amount discountable: \$ e.g.: \$900

Finance GL codes: Site: Business Unit: Account: 128

Amount of Discount requested: % e.g.: 10%

\$ e.g.: \$90

Total number of discounts offered: e.g.: 6

Total amount of discounts offered: \$ e.g.: \$540

Reason for requesting discounted fees i.e. student exchange, study abroad, special arrangement:

.....

Signed by: Date:

HOS:

Request Authorised / Declined

Reason.....

.....

Chief Operating Officer: Date:

Approved original to Customer Services

Copy to Originator and Finance