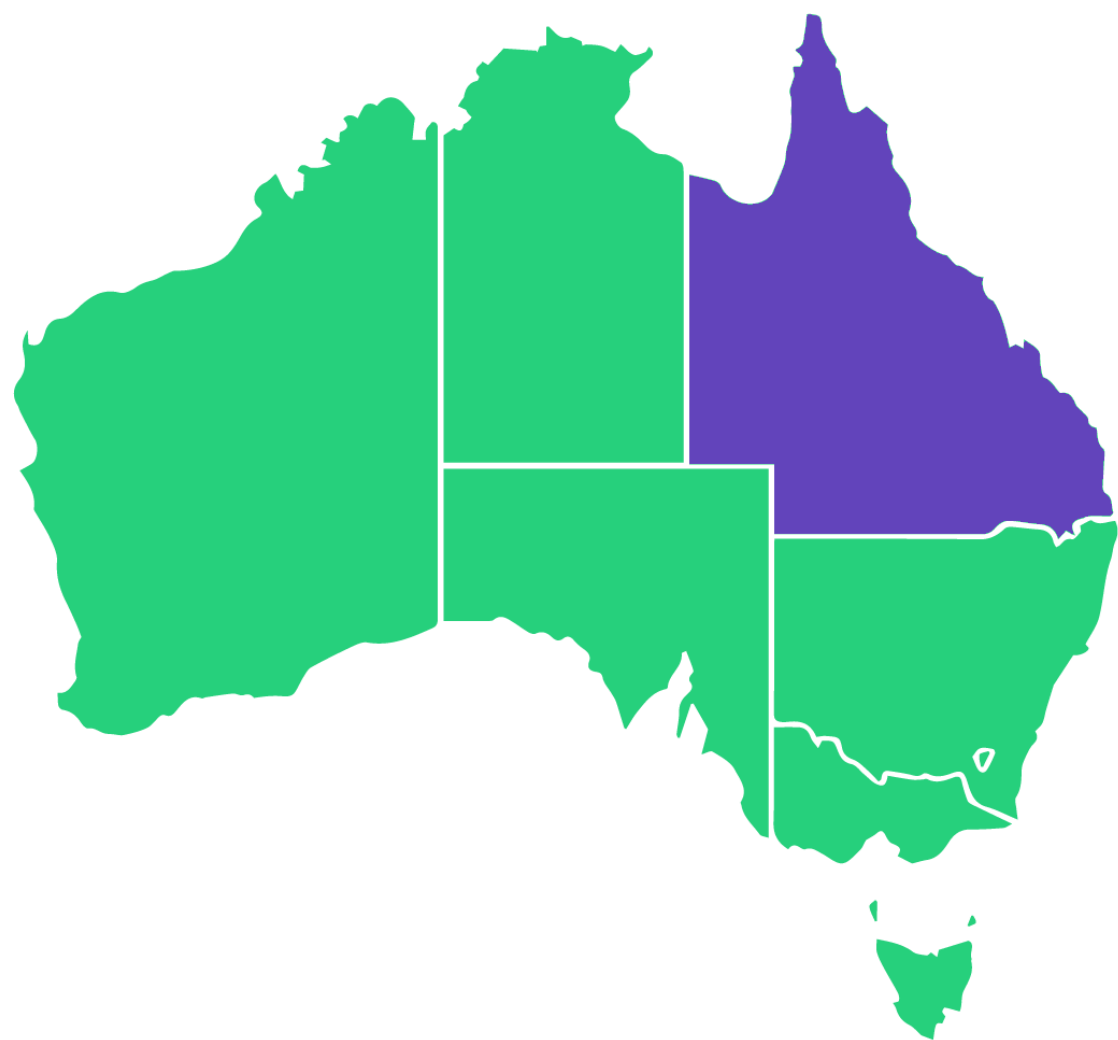


Queensland

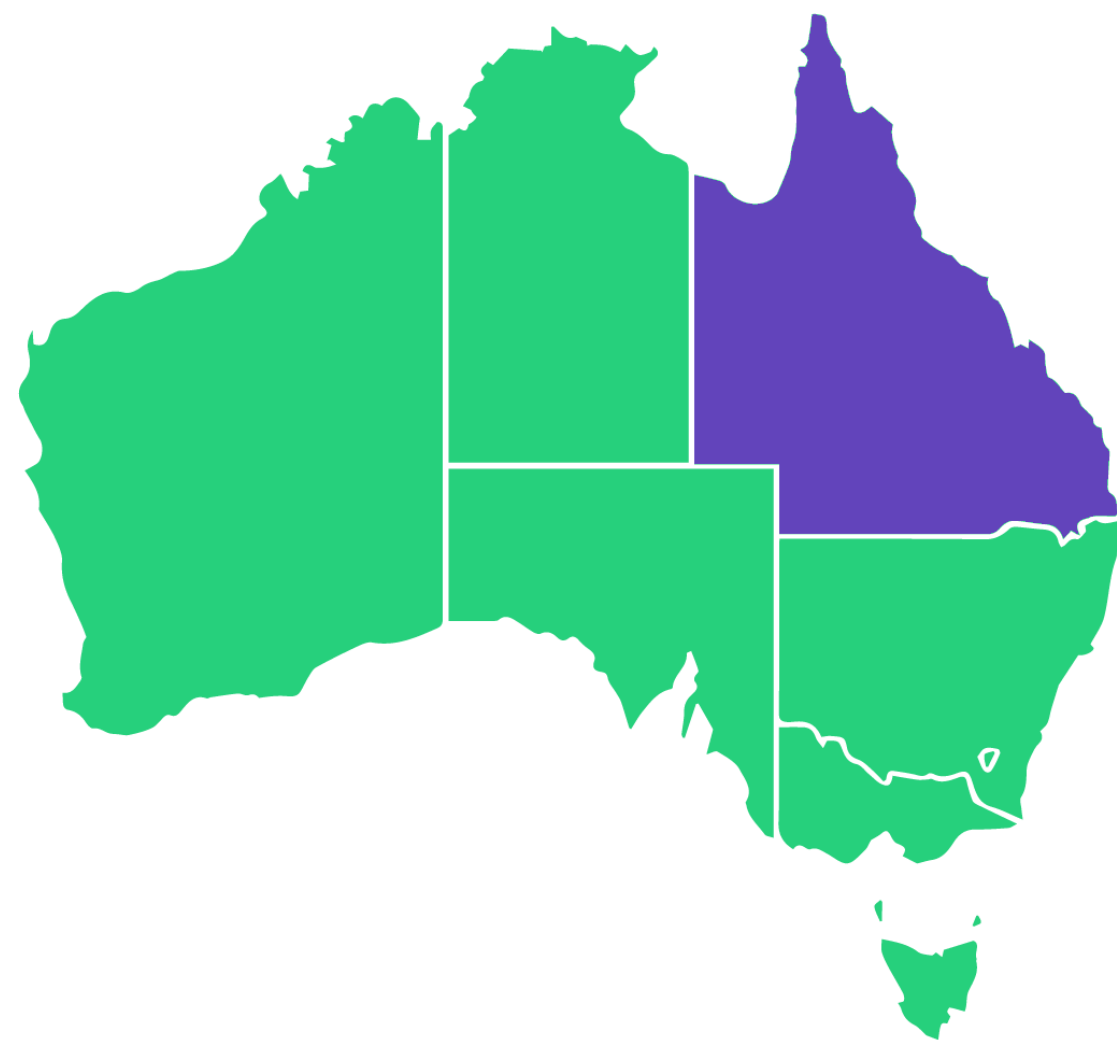


Agenda



Topics Covered	
1	State Funding Source
2	Contracts
3	Contract Change
4	Location Loading
5	Finance
6	Nominal Hours
7	Enrolment
8	Hours Attended
9	Traineeship/Apprenticeship
10	Training Plan
11	Reporting
12	Claim Payment Import

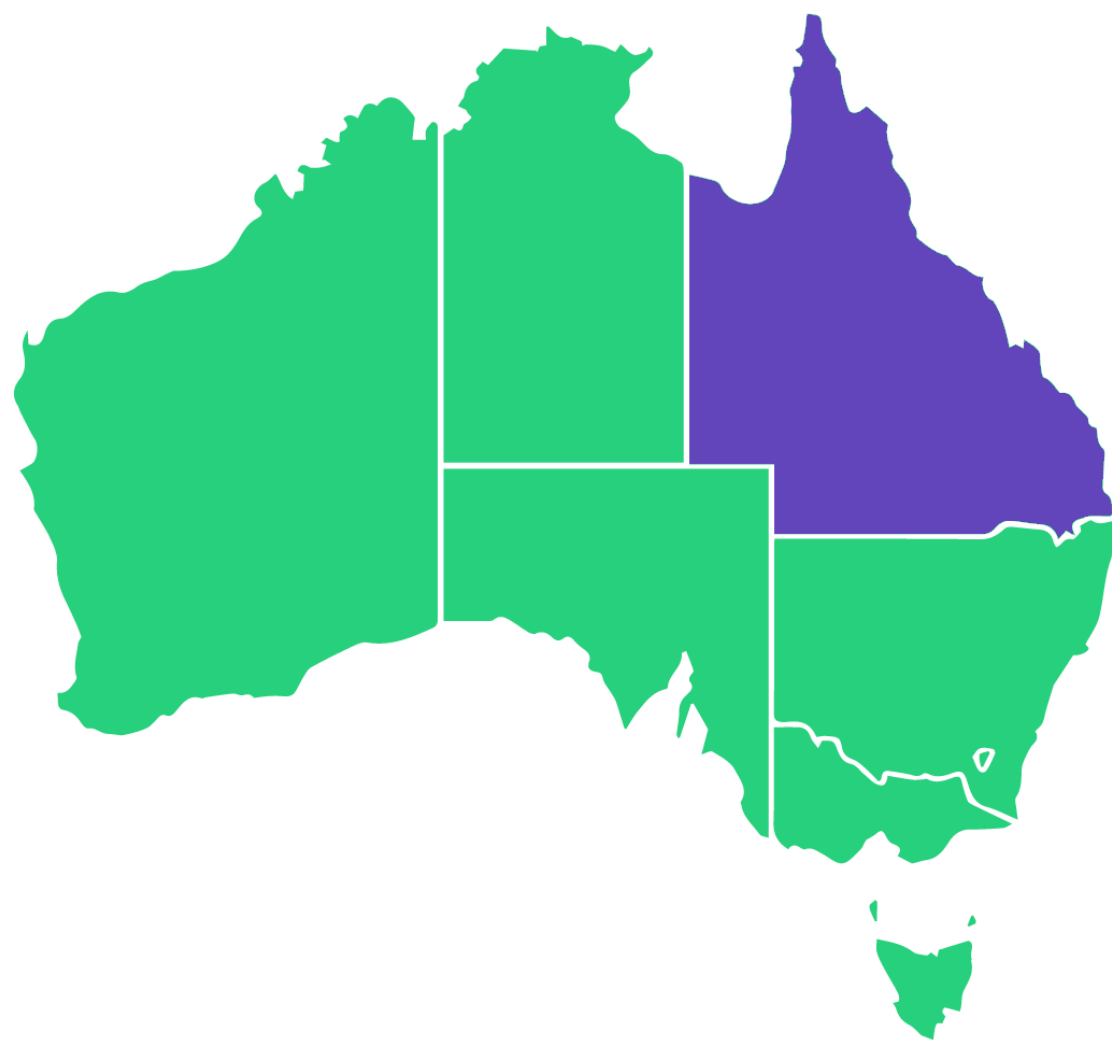
Agenda



Learning Objectives

- 1 To create location within the system
- 2 To update and create the contracts for the system
- 3 Create and update financial information
- 4 Understand how to setup Traineeships/Apprenticeships date within the system
- 5 Perform a claims report
- 6 Perform an update with the claims payment importer

QLD



State Training Authority (STA): Department of Education, Small Business and Training (DESBT)

Reporting System: Partner Portal

Website: <https://desbt.qld.gov.au/>

Reporting Documentation: <https://desbt.qld.gov.au/training/docs-data/statistics/rto-data>



State Funding Source

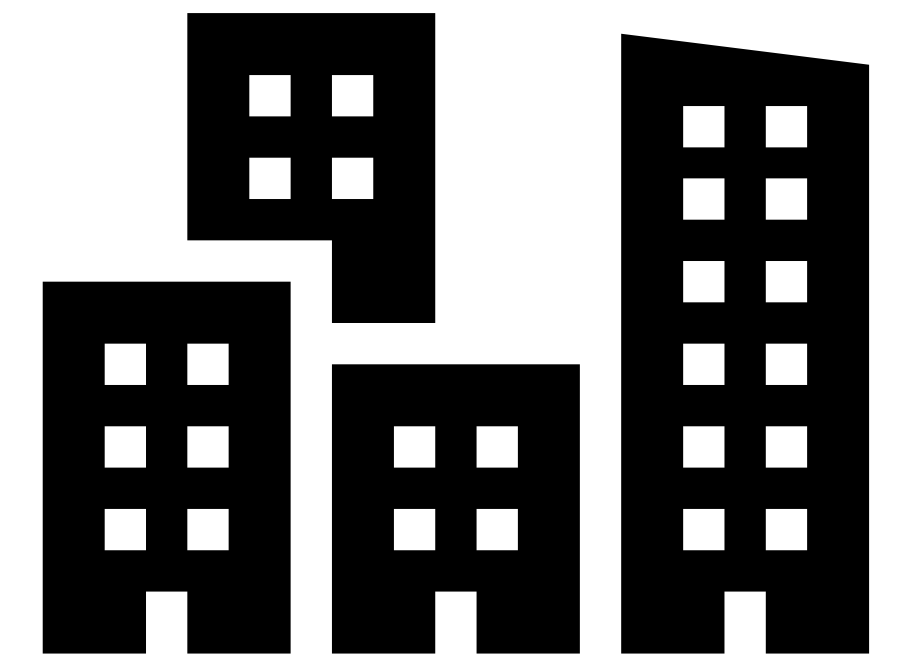


ReadyTech Education

State Funding Source

In addition to the standard national funding source identifiers, state reportable training requires you to enter the **state funding source identifier**. This may be a specific government funding scheme, or a stand-in for fee-for-service training.

There is a default list of funding sources available in the system, but if there are any new funding sources that you need, you can create a corresponding funding source in the SMS at your convenience



State Funding Source

Check/Adding

Check that your required state funding sources are available within the system by

Administration > Lookups > Compliance Data > Search > Funding Source State

Add any options not available

Enter the details based off your funding requirements to the new Funding Source

Setup

Setup > Compliance Data > Funding Source State

Enable allDisable all

1 - 100 of 301Page 1 of 41234»Last »

Name	Code	Description	State	Funding source national	Anzsic code required	Id	Traineeship Enabled	External ID
Enrolment Type Exceptions	00P	For Skills First enrolments where the Department of Education and Training has given the training provider a specific instruction to use this Funding Source Identifier.	Victoria	Commonwealth and State general purpose recurrent	285	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RSTF Aboriginal Workforce Development Project	01P	For Skills First enrolments under the Aboriginal Workforce Development Project. Only for use by training providers specifically engaged in this initiative.	Victoria	Commonwealth and State general purpose recurrent	286	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Construction Industry Skill Sets	02P	For Skills First enrolments in nominated construction industry short courses and skill sets. Only for providers enrolled in this initiative.	Victoria	Commonwealth and State general purpose recurrent	287	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Learning Fund - Jobseeker - Full Qualification	120		Tasmania	Commonwealth and State general purpose recurrent	243	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Learning Fund - Jobseeker - Skill Set	121		Tasmania	Commonwealth and State general purpose recurrent	244	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Learning Fund - Pre-Jobseeker - Full Qualification	122		Tasmania	Commonwealth and State general purpose recurrent	245	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Setup

Setup > New AVETMISS Reference Data Record > Funding Source State

savecancel

External ID

Name:

ACE Program - Disadvantaged Students

Code:

CSD

Description:

Enabled:

☒

Anzsic Code Required:

☐

Traineeship:

☐

State:

New South Wales

Funding Source National:

x11:Commonwealth and State general purpose recurrentx

savecancel

Lets go do it!

Let's take a look at:

- Adding a new funding source



 readytech



Contracts

 Review Session 2

ReadyTech Education

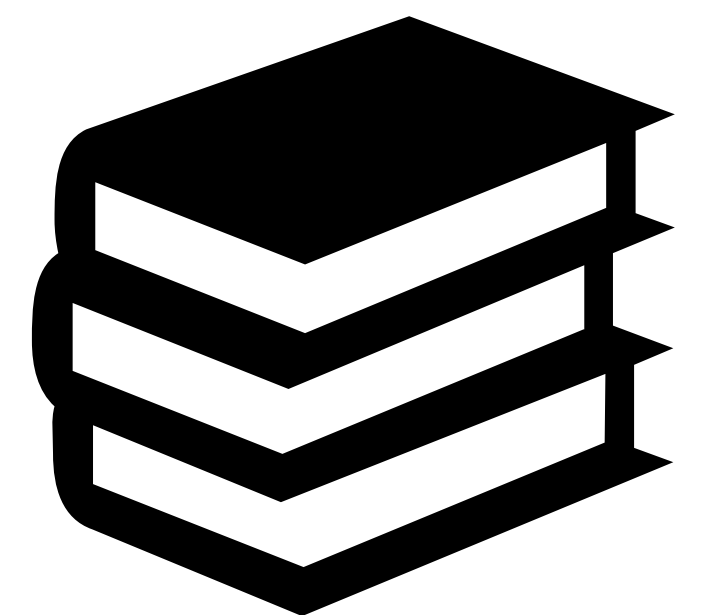
Contracts

“The Queensland Government invests in training based on industry advice to provide Queenslanders with the skills they need to gain meaningful and sustainable employment through the pre-approved training provider of their choice.

Government funding is directed to minimise skills shortages, focus on training for jobs that are in demand in our critical industries, and increase the number of Queenslanders with formal post-school qualifications.”

Reference: <https://desbt.qld.gov.au/training/providers/funded>

The QLD government issues contract and schedule number information to RTOs for certain types of funded training.



Contracts

Funding Contracts

A funding contract will exist between the department and the training provider for delivering government-subsidised training under a formally recognised program

Administration > Funding > Contracts

Select and enter the key information from your contract to meet your reporting requirements

Program: report the correct funding type (e.g. QLD user choice)

Contracts

+ New

Reload Schedules

Search:

☐ Include disabled contracts

Search

1 - 4 of 4

1 Page

Name	Code	State/Region	Program	Amount	Acquitted	Enabled	
2021-2022 FY	20212022FY	Queensland	Higher Level Skills	\$50.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
2023Contract	2023RTO2023	Victoria	Skills First		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
ACTFundingContractEG	ACTEG236	Australian Capital Territory	Skilled Capital		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
My Contract	123456789	Victoria	Skills First		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

1 - 4 of 4

1 Page

New Contracts

Save

Cancel

Contract Details

*Name:

*Code:

*State/Region:

Queensland

Funding Source:

*Program:

QLD User Choice 2022

Per Unit (\$):

Schedule:

Start Date:

End Date:

Reporting Period:

Acquitted:

☐

Enabled:

☒

Description

Queensland Specific

Priority Populations Groups (\$):

All Other Students Including SATs (\$):

Contract Totals

ReadyTech Education

110

Contracts

Attaching Contracts to Course

Attach Contracts to Courses upon creation in the Claims and Funding section

[Course > Add New Course](#)

Information is passed onto all enrolments

Available contracts will display after state/region has been set

Select the funding source

Main

*Course number:	CSEREA00061	*Start Date:	2/5/2023
Name:		*End Date:	
AVETMISS Code:	BSB50120	Enrolment Start:	
Program:	Diploma of Business	Enrolment End:	
Course Status:		*Max Enrolments:	0
Tags:		*Min Enrolments:	0
Location:	Brisbane	Rating:	☆☆☆☆☆ 0
Cost Centre:		Brand:	
*State/Region:	Queensland		

\$ Claims & Funding

VET Student Loans:	<input type="checkbox"/>	Funding Source State:	
Priority:		Funding Source National:	
Contract:	QLD contract (QLDcontract)	Fee Exemption State:	
		Client Tuition Fee:	\$ 0.00
		Resource Fee:	\$ 0.00

Contracts

Enrolment

State-based information for student enrolments that must be selected

Enrolments > Enrol Students

- **Contract** – Select contract
- **Funding Source State** – Select the funding source for the enrolment

New Enrolment
Spencer Smith (PAREA00045) in QLD - CSEREA00061 (BSB50120) from 1/5/2023 to 31/5/2023

COURSE STUDENT PROFILE COMPANY **ENROLMENT** UNITS SCHEDULING OUTCOMES FEES PAYMENTS CONFIRM
Set specific details into this enrolment

[Back](#) [Cancel](#) [Next](#) [Confirm Now](#)

Course: CSEREA00061 / QLD *Start Date: 1/5/2023
Program: BSB50120 / Diploma of Business *Target End Date: 31/5/2023
*Enrolment Status: Active End Date:
GPA: 0 Brand:

Course Details Trainee/Apprentice **Claims/Funding** Finance Higher Ed Custom Details

Contract: QLD contract (QLDcontr... x

Queensland

Claims & Funding

Fee Exemption State: Z: No Concession
*Funding Source National: 11:Commonwealth and State general purpose recurrent
Delivery Mode: Combination of internal and w
Survey Contact Status: Available for survey use x

Reporting Enabled: ☒
Funding Source State: YAP: Youth Access Program
Eligibility Exemption Indicator: ☐
Referral:
Employment Service Provider:

Lets go do it!

Let's take a look at:

- Setup funding Contract
- Create a Course with a Contract





Contract Change

ReadyTech Education

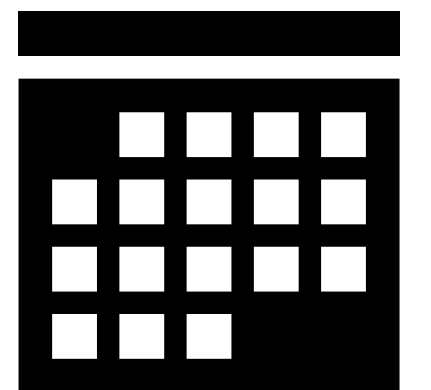
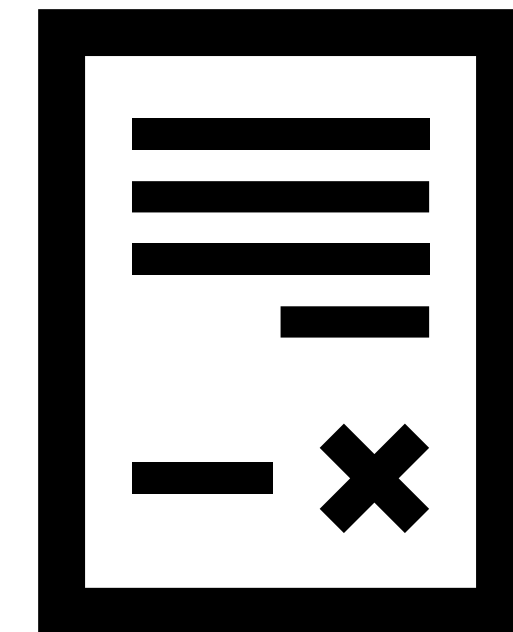
Contract Change

QLD government Contracts are issued for a financial year

The AVETMISS Standard uses the calendar year

You may have students enrolled in units that were started under one Contract, but were not completed before the end of the financial year. This means the student may fall under two contracts for a single enrolment.

Therefore, you may need to update contract linked to the enrolment



Contract Change

1. Create New Contract

Administration > Funding > Contracts

Select and enter the key information from your contract to meet your reporting requirements

Do this for each new Contract each financial year

New Contracts

 Save  Cancel

Contract Details

*Name:

2023-2024 FY

*Code:

2023-2024 FY

*State/Region:

Queensland

Funding Source:

*Program:

Cert 3 Guarantee

Per Unit (\$):

250

Schedule:

Start Date:

End Date:

Reporting Period:

Acquitted:

☐

Enabled:

☒

Description

Queensland Specific

Priority Populations Groups (\$):

All Other Students Including SATs (\$):

Contract Totals

Contract Change

2. Enrolment Update (Option 1)

Every student enrolment that is affected needs to be located

Enrolments > Enrolment List > select students enrolment > Edit > Claims/Funding

The old contract will need to be removed and the new one added

Enrolment Edit ENREA00346 / Spencer Smith (PAREA00045)

Course:	CSEREA00061 / QLD	*Start Date:	1/5/2023
Program:	BSB50120 / Diploma of Business	*Target End Date:	31/7/2023
*Enrolment Status:	Active	End Date:	
GPA:	0	Brand:	

Course Details Trainee/Apprentice **Claims/Funding** Finance Higher Ed Custom Details

Contract: 2022-2023 FY (20222023FY) x

Queensland

Enrolment Edit ENREA00346 / Spencer Smith (PAREA00045)

Course:	CSEREA00061 / QLD	*Start Date:	1/5/2023
Program:	BSB50120 / Diploma of Business	*Target End Date:	31/7/2023
*Enrolment Status:	Active	End Date:	
GPA:	0	Brand:	

Course Details Trainee/Apprentice **Claims/Funding** Finance Higher Ed Custom Details

Contract: 2023-2024 FY (2023-2024 FY) x

Queensland

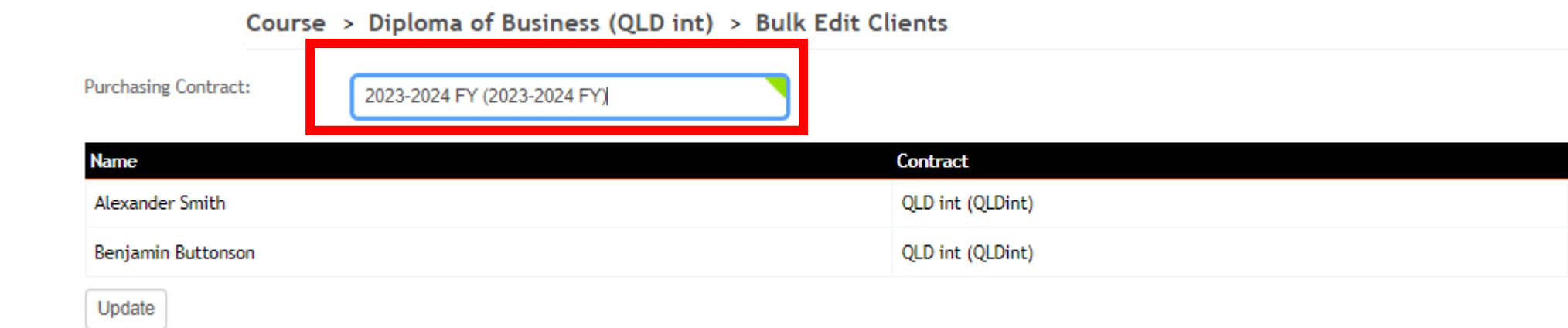
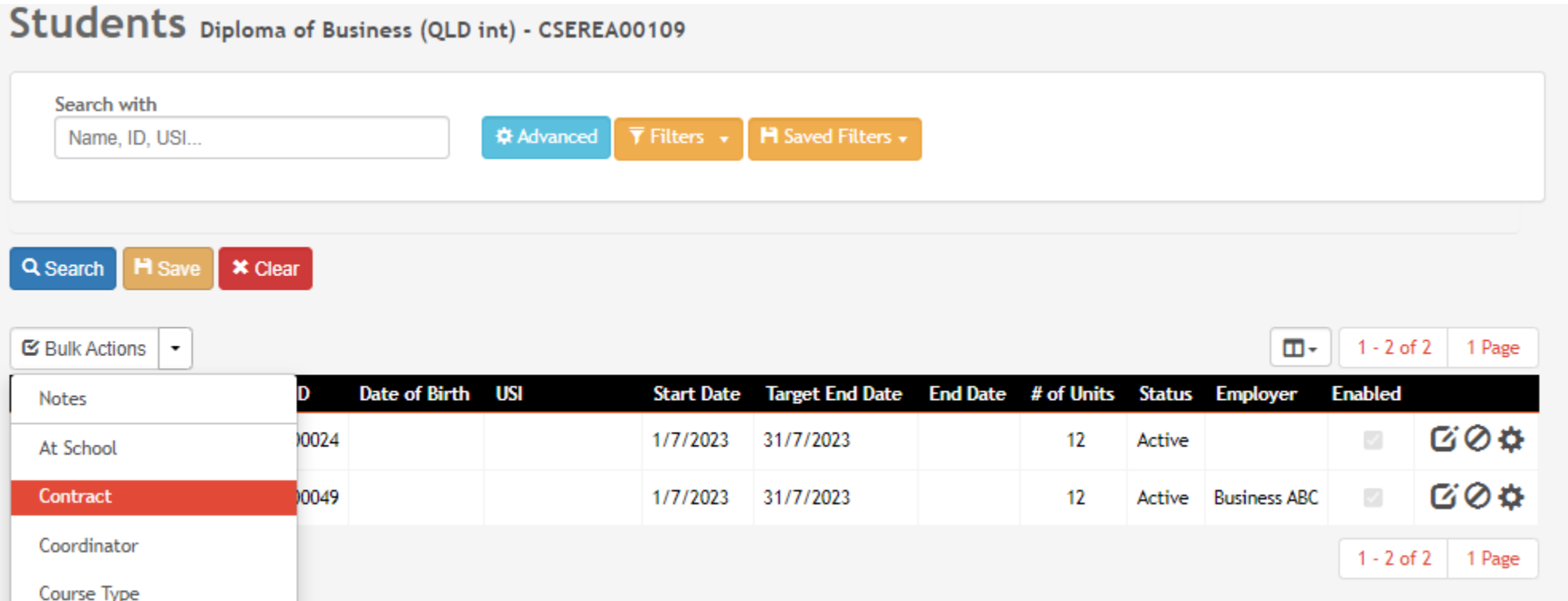
Contract Change

2. Bulk Update (Option 2)

This can be done in Bulk at a course level

Course > Course list > select course > Students

This updates the enrolment level contract for each student



Contract Change

3. Go to the Units

Navigate to the unit section of the enrolment

Enrolment Details

ENREA00346 / Spencer Smith (PAREA00045)

Student: Spencer Smith (PAREA00045)

Course: CSEREA00061 / QLD

Program: BSB50120 / Diploma of Business

Enrolment Status: Active

GPA: 0

Enrolment ID: ENREA00346

Start Date: 1/5/2023

Target End Date: 31/7/2023

End Date:

Brand:

Summary

Units

25.0%

Total Units: 12

Total Units Completed: 3

Attendance

0.00%

Scheduled Hours: 0.0

Attended Hours: 0.0

Invoiced

100.0%

Total Projected: \$15000.00

Total Invoiced: \$15000.00

Claims

0%

Total Claims: 12

Total Invoiced: 0

Course Details

Trainee/Apprentice

Claims/Funding

Finance

Higher Ed

Custom Details

More

Contract: 2023-2024 FY (2023-2024 FY)

Queensland

Claims & Funding

Fee Exemption State: Z: No Concession

Funding Source National: 11:Commonwealth and State general purpose recurrent

Delivery Mode: Combination of internal and workplace-based

Survey Contact Status: Available for survey use

State Specific Data

Reporting Enable

Funding Source

Eligibility Exem

Employment Se

Priority:

Prospect:

Training Partnerships

Units

Electives

Attendance

Events

Claims

Invoice Options

Smart Fees Invoicing

Employers

Transfer

Contract Change

4. Edit Units Contract

Some units will need to have the contract updated

Open details 

Update the contract under the contract details for the units that require updating

Units

Edit - ENREA00346 / Spencer Smith (PAREA00045)

Save

Cancel

Student: Spencer Smith (PAREA00045)

Course: CSEREA00061 / QLD

Program: BSB50120 / Diploma of Business

Enrolment Status: Active

GPA: 0

Enrolment ID: ENREA00346

Start Date: 1/5/2023

Target End Date: 31/7/2023






End Date:

Brand:

Core

Bulk Actions

TGA Packaging Rules

Code	Unit	Outcome	Start Date	Target End Date	End Date		
<input type="checkbox"/>	BSBCRT511	Develop critical thinking in others	Competent - 20	1/5/2023		3/5/2023	
<input type="checkbox"/>	BSBFIN501	Manage budgets and financial plans	Competent - 20	1/5/2023		3/5/2023	
<input type="checkbox"/>	BSBOPS501	Manage business resources	Continuing enrolment - 70	1/5/2023	31/7/2023		
<input type="checkbox"/>	BSBSUS511	Develop workplace policies and procedures for sustainability	Competent - 20	1/5/2023		3/5/2023	
<input type="checkbox"/>	BSBXC501	Lead communication in the workplace					

Elective

Units

Edit - ENREA00346 / Spencer Smith (PAREA00045)

Save

Cancel

Student: Spencer Smith (PAREA00045)

Course: CSEREA00061 / QLD

Program: BSB50120 / Diploma of Business

Enrolment Status: Active

GPA: 0

Enrolment ID: ENREA00346

Start Date: 1/5/2023

Target End Date: 31/7/2023




End Date:

Brand:


Core


Bulk Actions

TGA Packaging Rules


Code	Unit	Outcome	Start Date	Target End Date	End Date		
<input type="checkbox"/>	BSBCRT511	Develop critical thinking in others	Competent - 20	1/5/2023		3/5/2023	
<input type="checkbox"/>	BSBFIN501	Manage budgets and financial plans	Competent - 20	1/5/2023		3/5/2023	
<input type="checkbox"/>	BSBOPS501	Manage business resources	Continuing enrolment - 70	1/5/2023	31/7/2023		


More Details

Delivery Mode: -- Use Enrolment V: 

Predominant delivery mode: -- Use Enrolment V: 

Claims & Funding

Contract2023-2024 FY (20... 

Funding Source State: -- Use Enrolment V: 

Fees

Tuition Fee: Fees (0)

International

Lets go do it!

Let's take a look at:

- Update Contract for enrolment and units





Location Loading

Location Loading

“Training delivered in country, remote, Cape York and Torres Strait regions of the state will attract a location loading in addition to the government contribution. A full list of locations and the relevant loadings is available on the [User Choice documents page](#).

To be eligible to claim the Cape York and Torres Strait loadings, training and assessment services must not only be delivered in the Cape York or Torres Strait region, but be provided to participants that reside in the Cape York or Torres Strait region — as encapsulated by the 4871, 4873, 4874, 4875, 4876 and 4895 postcodes areas only.”

Reference: <https://desbt.qld.gov.au/training/providers/funded/userchoice/pricing>

Priority Skills List localities and location loadings list							
Training delivered in country, remote, Cape York and Torres Strait regions will attract a location loading in addition to the government contribution for AVETMISS Delivery Mode identifiers 10 Classroom-based and 30 Employment-based only. Effective from 1 January 2018 for AVETMISS release 8, the location loading will be based on predominant delivery mode for AVETMISS State identifiers "I" Classroom-based and "W" Workplace-based only. To be eligible to claim the Cape York (including Remote-SpecialArea ¹), Cherbourg ¹ , Palm Island ¹ or Torres Strait loadings, training and assessment services must be delivered to eligible participants in the Cape York (including Remote-SpecialArea ¹), Cherbourg ¹ , Palm Island ¹ or Torres Strait regions as encapsulated by the 4871, 4873, 4874, 4876, 4892 and 4895 specified areas only in addition to 4605 Cherbourg ² and on Palm Island ¹ .							
*To enable payment at the quoted Training Subsidy price factor, locality names marked with an asterisk must have exactly the same locality name in the AVETMISS data submission.							
+Applicable to Queensland VET Investment Programs (Certificate 3 Guarantee and Higher Level Skills) only (excluding User Choice programs).							
¹ Applies to training outcomes achieved from 1 July 2019.							
Locality Name	Postcode	State	Local Government Area	Region	Locality Type	Region - Payment	Training Subsidy Price Factor
ABBNEYWOOD	4613	QLD	South Burnett Regional Council	Darling Downs South West	Suburb	Country	115%
ABBOTSFORD	4670	QLD	Bundaberg Regional Council	North Coast	Suburb	Country	115%
ABERCORN	4627	QLD	North Burnett Regional Council	Central Queensland	Suburb	Country	115%
ABERGOWRIE	4850	QLD	Hinchinbrook Shire Council	North Queensland	Suburb	Country	115%
ABINGDON DOWNS	4892	QLD	Etheridge Shire Council	Far North Queensland	Suburb	Country	115%
ABINGTON	4660	QLD	Bundaberg Regional Council	North Coast	Suburb	Country	115%
ACLAND	4401	QLD	Toowoomba Regional Council	Darling Downs South West	Suburb	Country	115%
ADARE	4343	QLD	Lockyer Valley Regional Council	Darling Downs South West	Suburb	Country	115%
ADAVALE	4474	QLD	Quilpie Shire Council	Darling Downs South West	Suburb	Remote	175%
ADELAIDE PARK	4703	QLD	Rockhampton Regional Council	Central Queensland	Suburb	Country	115%
AEROGLEN	4870	QLD	Cairns Regional Council	Far North Queensland	Suburb	Country	115%
AGNES WATER	4677	QLD	Gladstone Regional Council	North Coast	Suburb	Country	115%
AIRLIE BEACH	4802	QLD	Whitsunday Regional Council	North Queensland	Suburb	Country	115%
AIRVILLE	4807	QLD	Burdekin Shire Council	North Queensland	Suburb	Country	115%
AITKENVALE	4814	QLD	Townsville City Council	North Queensland	Suburb	Country	115%
AITKENVALE BC	4814	QLD	Townsville City Council	North Queensland	Suburb	Country	115%
AITKENVALE DC	4814	QLD	Townsville City Council	North Queensland	Suburb	Country	115%
ALBERTA	4702	QLD	Rockhampton Regional Council	Central Queensland	Suburb	Country	115%
ALDERSHOT	4650	QLD	Fraser Coast Regional Council	North Coast	Suburb	Country	115%

Location Loading

Location Loading

“*To enable payment at the quoted User Choice price factor, locality names marked with an asterix must have exactly the same locality name in the AVETMISS claim data”

Reference: <https://desbt.qld.gov.au/training/providers/funded/userchoice/pricing>

Mandatory to identify locations for both state and federal reporting when looking for loading ensure data is copied correctly.

Administration > Lookups > Locations/Facilities

User Choice localities and location loadings list

Training delivered in country, remote, Cape York and Torres Strait regions of the state will attract a location loading in addition to the government contribution. To be eligible to claim the Cape York (including Remote-SpecialArea¹), Cherbourg¹, Palm Island² or Torres Strait loading, training and assessment services must not only be delivered in the Cape York (including Remote-SpecialArea¹), Cherbourg¹, Palm Island² or Torres Strait region, but provided to participants that reside in the Cape York (including Remote-SpecialArea¹), Cherbourg¹, Palm Island² or Torres Strait region (encapsulated by postcode areas 4871, 4873, 4874, 4875, 4876, 4892 and 4895 specified areas only) in addition to 4605 Cherbourg¹ and Palm Island².

*To enable payment at the quoted User Choice price factor, locality names marked with an asterix must have exactly the same locality name in the AVETMISS claim data

+Applicable to User Choice 2017-20, 2016-17 and 2010-16 programs (excluding Queensland Government subsidised training places)

¹Applies to training outcomes achieved from 1 July 2019

Locality Name	*	Postcode	State	Local Government Area	Region	Locality Type	Region - Payment	User Choice Price Factor
ABBNEYWOOD		4613	QLD	South Burnett Regional Council	Darling Downs South West	Suburb	Country	115%
ARCADIA BAY		4819	QLD	Townsville City Council	North Queensland	Suburb	Country	115%
ARCHER RIVER ¹	*	4892	QLD	Cook Shire Council	Far North Queensland	Suburb	Cape York	250%
ARGOON		4702	QLD	Rockhampton Regional Council	Central Queensland	Suburb	Country	115%
ARKENDEITH		4806	QLD	Burdekin Shire Council	North Queensland	Suburb	Country	115%
AUGUSTUS DOWNS		4830	QLD	Carpentaria Shire Council	North Queensland	Suburb	Remote	175%
AURUKUN	*	4892	QLD	Aurukun Shire Council	Far North Queensland	Suburb	Cape York	250%
AVENELL HEIGHTS		4670	QLD	Bundaberg Regional Council	North Coast	Suburb	Country	115%
AVOCA		4670	QLD	Bundaberg Regional Council	North Coast	Suburb	Country	115%
AVONDALE		4670	QLD	Bundaberg Regional Council	North Coast	Suburb	Country	115%
AYR		4807	QLD	Burdekin Shire Council	North Queensland	Suburb	Country	115%
AYTON ¹	*	4895	QLD	Cook Shire Council	Far North Queensland	Suburb	Cape York	250%
BABINDA		4861	QLD	Cairns Regional Council	Far North Queensland	Suburb	Country	115%
BACK PLAINS		4361	QLD	Toowoomba Regional Council	Darling Downs South West	Suburb	Country	115%
BADDOW		4650	QLD	Fraser Coast Regional Council	North Coast	Suburb	Country	115%
BADU ISLAND	*	4875	QLD	Torres Strait Island Regional Council	Far North Queensland	Suburb	Torres Strait	250%
BAFFLE CREEK		4674	QLD	Gladstone Regional Council	North Coast	Suburb	Country	115%

Setup > New Location

createcancel

Details

*Location Code:

AURUKUN

*Name:

AURUKUN

Description:

Location Contact Number:

Brand:

Location Information:

Address:

Click here to search addresses

Building/prop. name

Unit/Flat Number

Postal delivery box

*Street/lot number

15

*Street name

Long

readytech

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124

Location Loading

Tracking (optional)

You can track a location load within the settings under the claims loading for a location

Claims loading will need to be added into the system within reference data
[Administration > Lookups > Reference Data > Claim Loading](#)

Settings

Enabled: ☒

Claim Loading:

VET Student Loans: ☐

Fee-Help: ☐

Setup > Reference Data

Search:

Search

1 - 1 of 11 Page

Name	Description
Claim Loading	Claim Loading

Setup > Reference Data > Claim Loading > New

createcancel

Claim Loading

ID:1

External ID

Name:

* Code

Description

Load percent

Enabled☐

createcancel



Finance

 Review Session 6

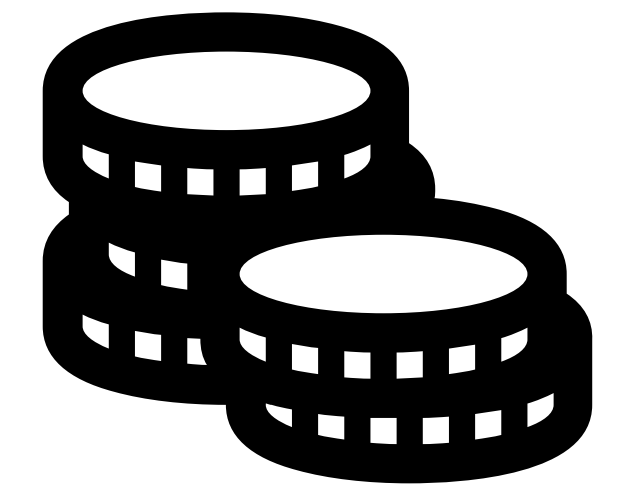
Finance

Co-contribution fee

Some state funded training activity may require a co-contribution fee be reported

“The co-contribution fee charged for a qualification or offering must represent the total cost to the student and include any enrolment charges (such as identification card charges), tuition fees, services fees, materials fees and all other costs associated with delivering the training and assessment services and awarding the qualification.”

Reference: https://desbt.qld.gov.au/__data/assets/pdf_file/0027/11889/sas-policy.pdf



Finance

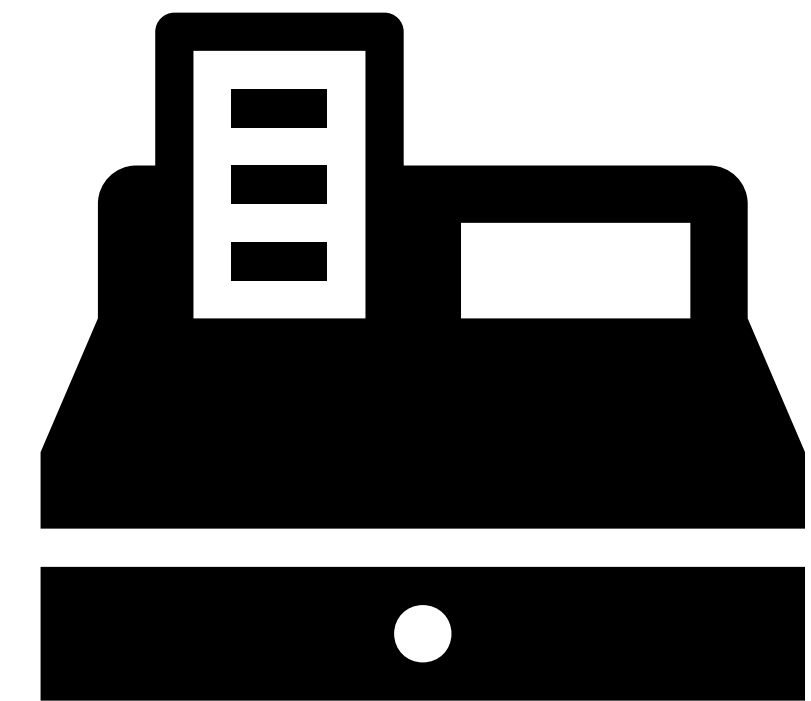
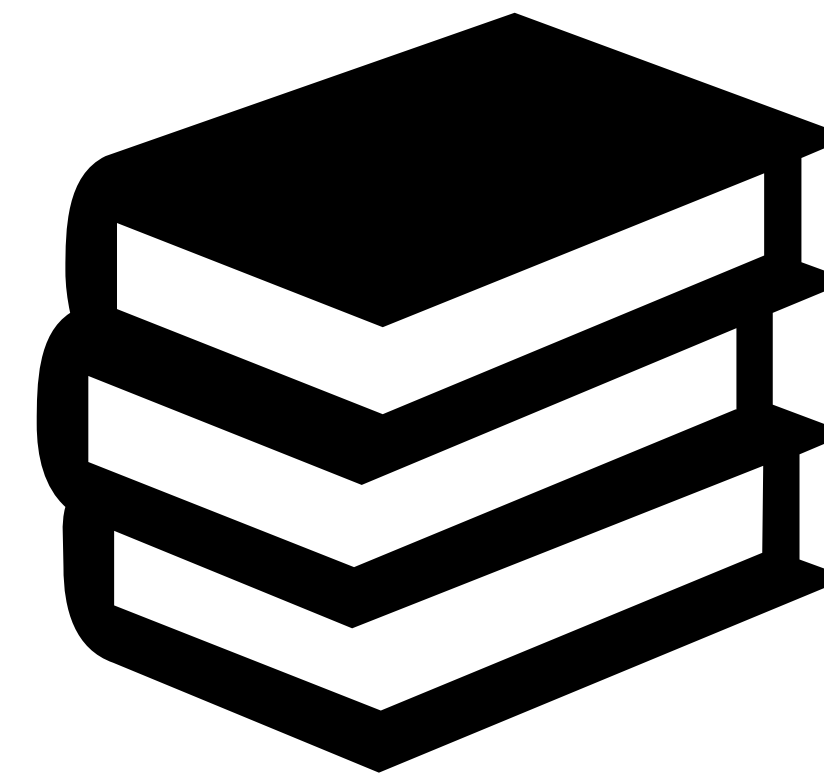
Options

There are four options for reporting the tuition and resource fee

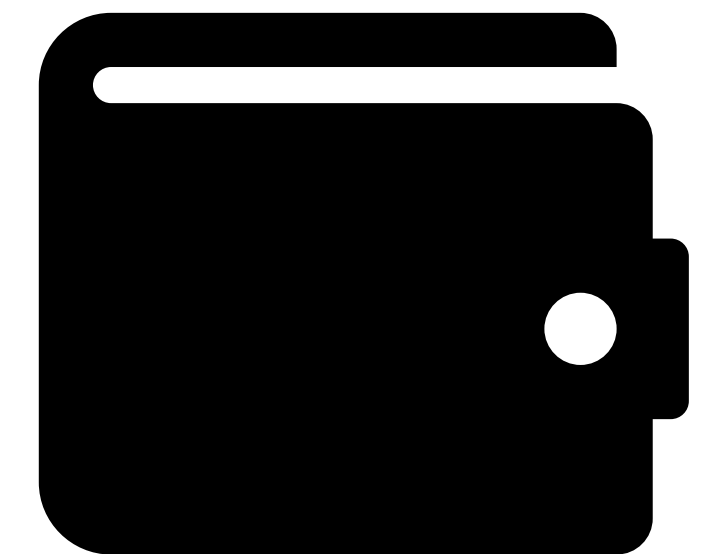
1. Smart Fee
2. Course level fees
3. Enrolment level fees
4. Unit Level fees

NOTE!

Combinations can be used e.g. Smart fees for tuition fees and resource fee at enrolment level



1. Smart Fee



Finance

Smart Fee - Setup

Smart fees are created by:

- 1. Setting up a smart fee library
 - A. Manually linking to Course
 - B. Automatic Smart Fee
- 2. Linking to a Course
- 3. Use during enrolment

Edit Smart Fees

Save

Cancel

Details

Name

QLD - Course Fee

Type

Course Fee

Category

Unit

Description

Status

Approved

Pricing Period

Start Date

End Date

Settings

Agent Commission

Deferred Revenue

Discount (Code)

Enabled

Scholarships

Enabled

Scholarships

Amount

Ledger

Enrolment Fees (123456)

Amount

\$ 450.00

Total

\$ 450.00

Allow Amount Adjustment

Subledger

Tax

GST Free

Multiplier

None

Modifier Rules

readytech

ReadyTech Education

130

Finance

Smart Fee: Smart Fee Library

Administration > Finance > Smart Fee Library > +

When creating your Smart Fee Library to report the correct fee type for each unit you need to select:

Type: Type of fee required

To ensure it reports correctly for each unit within the NAT00120 select:

Category = Unit

This will allow you to report the amount against each unit

New Smart Fees

Save Cancel

Details

Name: [Text Field] Status: New x

Type: [Dropdown Menu] Pricing Period: [Text Field]

Category: [Text Field] Start Date: [Text Field] i

Description: [Text Field] End Date: [Text Field] i

Settings

Agent Commission: [Text Field] Enabled: [Checked Box]

Details

Name: QLD - Course Fee Status: Approved x

Type: Course Fee x Pricing Period: [Text Field]

Category: [Dropdown Menu] Start Date: [Text Field] i

Description: [Text Field] End Date: [Text Field] i

Finance

Smart Fee – On Enrolment

At time of enrolment, you will be able to select the required smart fee library

Enrolments > Enrol Students

New Enrolment

Spencer Smith (PAREA00045) in QLD - CSEREA00061 (BSB50120) from 1/5/2023 to 31/5/2023

COURSE

STUDENT PROFILE

COMPANY

ENROLMENT

UNITS

SCHEDULING

OUTCOMES

FEE\$

PAYMENTS
Apply your payment option

CONFIRM

Cancel

Back

Next

Confirm Now

No payment options available for this course

Search

Enter Name

Smart Fees

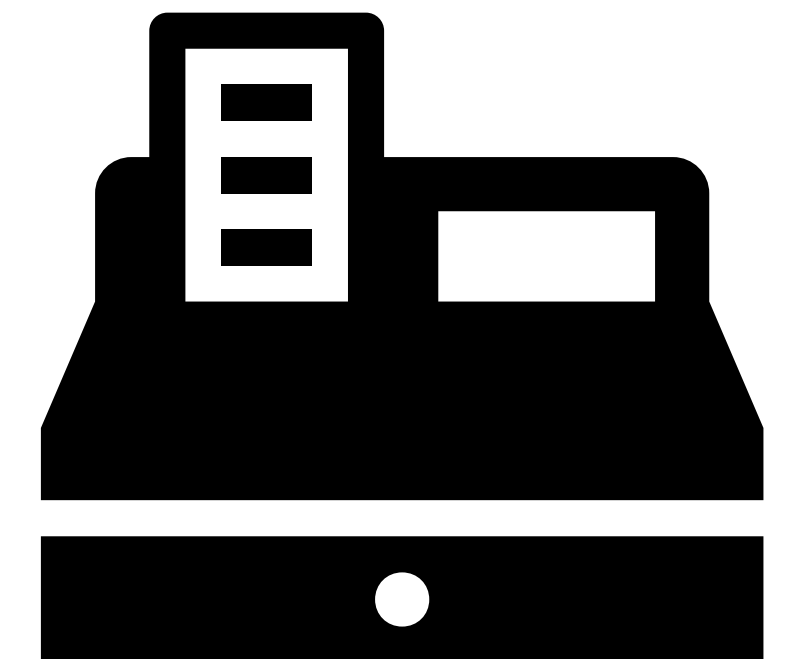
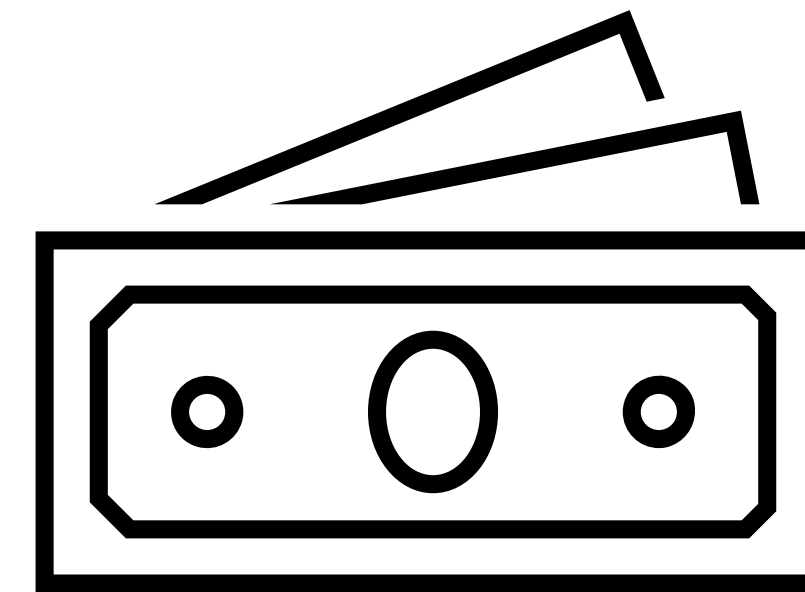
☒ SS

\$5400.00

Line Items

Description	Amount	Multiplier	Tax	Tax Amount	Total	
QLD - Course Fee x	\$ 450.00	None	GST Free	\$ 0.00	\$ 450.00	
Unit : Apply critical thinking for complex problem solving (BSBCRT611)						
QLD - Course Fee x	\$ 450.00	None	GST Free	\$ 0.00	\$ 450.00	
Unit : Adapt organisations to enhance accessibility for people with disability (BSBXDB502)						
QLD - Course Fee x	\$ 450.00	None	GST Free	\$ 0.00	\$ 450.00	
Unit : Articulate, present and debate ideas (BSBCRT412)						
QLD - Course Fee x	\$ 450.00	None	GST Free	\$ 0.00	\$ 450.00	

2. Course Level Fees



Finance

Course Level Fees

Course > Add New Course > Claims & funding

When creating a Course, you can setup a Client Tuition fee and/or Resource fee which will be then inherited by any enrolments if they aren't overwritten by:

- Enrolment level fees
- Smart fees
- Unit level fees

Note !

This will report as total divided by number of units

\$ Claims & Funding

VET Student Loans:

☐

Funding Source State:

Priority:

Funding Source National:

Contract:

Start Typing...

Fee Exemption State:

Client Tuition Fee:

\$ 0.00

Resource Fee:

\$ 0.00

Course Details

Trainee/Apprentice

Claims/Funding

Finance

Higher Ed

Custom Details

More

Contract:

2023-2024 FY (2023-2024 FY)

Queensland

Claims & Funding

Fee Exemption State:

Z: No Concession

Reporting Enabled:

☐

Funding Source National:

11: Commonwealth and State general purpose recurrent

Funding Source State:

WTP: Community Training Partnerships

Delivery Mode:

Combination of internal and workplace-based

Eligibility Exemption Indicator:

N

Survey Contact Status:

Available for survey use

Employment Service Provider:

Priority:

Prospect:

State Specific Data

FSWA Category:

Delivery Mode Predominant:

Payment

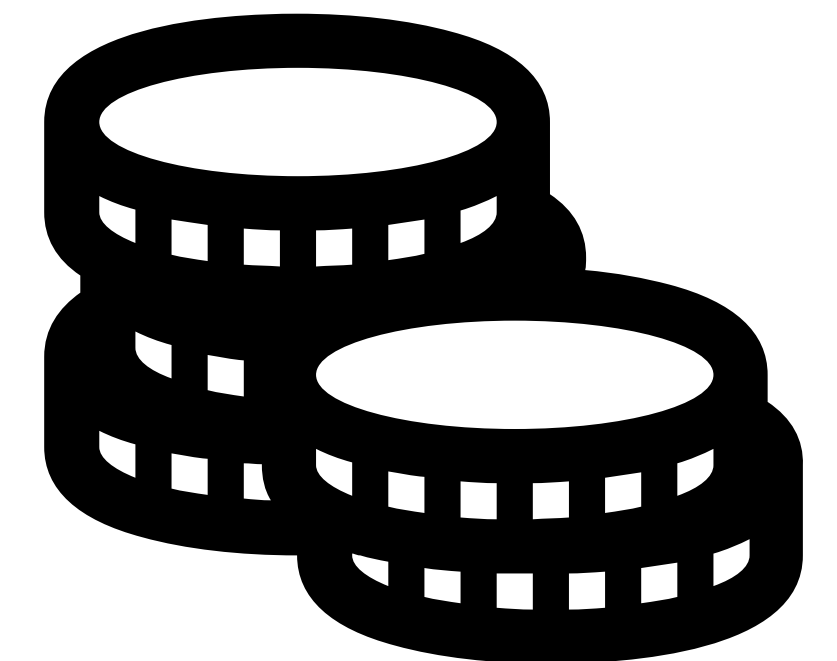
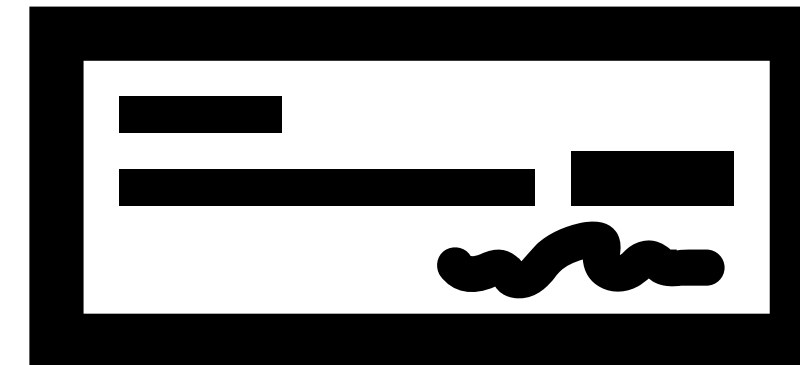
Client Tuition Fee:

\$1,500.00

Resource Fee:

\$75.00

3. Enrolment Level Fees



Finance

Enrolment Level

It's possible to set a fee that is reported as the single upfront tuition fee charged to the program enrolment as a dollar value in the NAT00130 file. This can be set at the Enrolment level.

Enrolments > Enrol Students

This will overwrite any:

- Course level

However, can also be overwritten by:

- Smart Fees
- Unit level fees

Course Details

Trainee/Apprentice

Claims/Funding

Finance

Higher Ed

Custom Details

Contract: 2023-2024 FY (2023-2024 FY) x

Queensland

Claims & Funding

Fee Exemption State: Z: No Concession i

*Funding Source National: 11: Commonwealth and State general purpose recurrent

Delivery Mode: Combination of internal and w

Survey Contact Status: Available for survey use x

Reporting Enabled: ☒ i

Funding Source State: WTP: Community Training Partnerships

Eligibility Exemption Indicator: ☐

Referral:

Employment Service Provider:

Priority:

State Specific Data

FSWA Category:

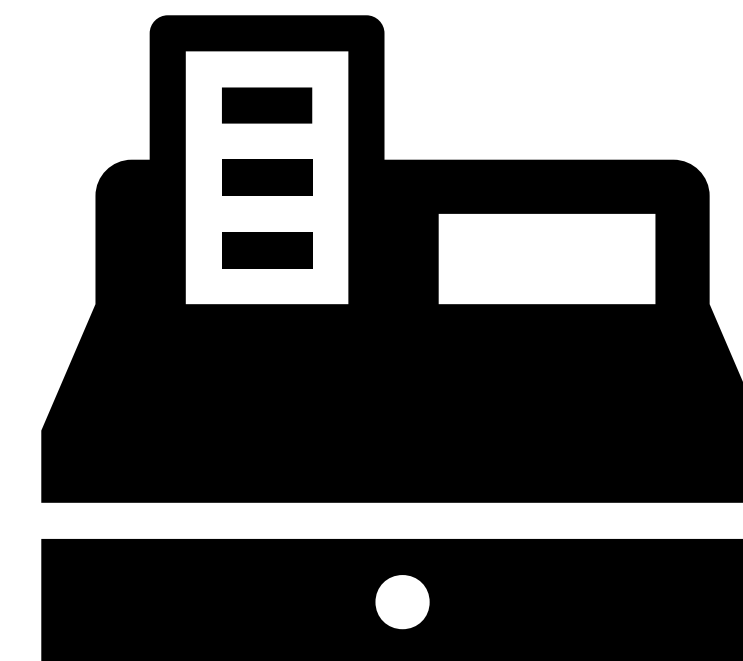
Delivery Mode Predominant:

Payment

Client Tuition Fee:

Resource Fee:

4. Unit Level Fees



Finance

Unit Level – Enable Fees Selection

To see the unit fees selection within enrolments, this feature needs either:

- System Wide:
Administration > Configuration > Preferences > Enrolments > Enrolment Wizard >
- Program Specific:
Administration > Curriculum > Program > select program > Enrolment Preferences > Enrolment Wizard >
- Course Level:
Course > List All > select course > Admin > Enrolment Preferences > Enrolment Wizard >

The screenshot displays the 'Enrolment Preferences' interface for QLD (CSEREA00061). It features a 'Save' button and a 'Cancel' button at the top. The interface is divided into two main sections: 'Enrolment' and 'Enrolment Wizard'. The 'Enrolment Wizard' section is currently active and contains various settings. The 'Show Unit Fees Selecting' option is checked and highlighted with a red box. Other settings include 'Academic Period Selection on Enrolment Wizards' (unchecked), 'Allow no payment' (checked), 'Allow re-enrolment' (checked), 'Allow re-enrolment into Units' (unchecked), 'Collect AVETMISS details' (checked), 'Collect electives' (checked), 'Collect employment details' (checked), 'Collect payment options' (checked), 'Collect unit outcomes' (checked), 'Course details' (radio buttons for 'Customise for each student' and 'Use course settings'), 'Default enrolment status' (Active), 'Default Start Date to Created Date on Enrolment Wizard' (unchecked), 'Default Unit Outcome' (dropdown), 'Enrol onto events' (checked), 'Generate Target End Date from Total No. of Weeks' (unchecked), 'Ignore all 'RTO' Validations on Enrolment Wizard' (unchecked), and 'Show Unit Fees Selecting' (checked).

Section	Setting	Value
Enrolment	Decouple same Activities/Elements in multiple Units:	<input type="checkbox"/>
	Inherit Subject Dates from Units:	<input type="checkbox"/>
	Allow Enrolments	<input type="checkbox"/>
Enrolment Wizard	Academic Period Selection on Enrolment Wizards:	<input type="checkbox"/>
	Allow no payment:	<input checked="" type="checkbox"/>
	Allow re-enrolment:	<input checked="" type="checkbox"/>
	Allow re-enrolment into Units:	<input type="checkbox"/>
	Collect AVETMISS details:	<input checked="" type="checkbox"/>
	Collect electives:	<input checked="" type="checkbox"/>
	Collect employment details:	<input checked="" type="checkbox"/>
	Collect payment options:	<input checked="" type="checkbox"/>
	Collect unit outcomes:	<input checked="" type="checkbox"/>
	Course details:	<input checked="" type="radio"/> Customise for each student <input type="radio"/> Use course settings
	Default enrolment status:	Active
	Default Start Date to Created Date on Enrolment Wizard:	<input type="checkbox"/>
	Default Unit Outcome:	
	Enrol onto events:	<input checked="" type="checkbox"/>
Generate Target End Date from Total No. of Weeks:	<input type="checkbox"/>	
Ignore all 'RTO' Validations on Enrolment Wizard:	<input type="checkbox"/>	
Show Unit Fees Selecting:	<input checked="" type="checkbox"/>	

Finance

Unit Level – Setup Unit Cost

To set the fee for each unit locate the unit

Administration > Curriculum > Unit > select unit > Fees > +

Enter the details for the unit fees

This would need to be done for each unit

Unit

Details

Elements

Programs 1

Requisites

Fees

Notes / Checklists 0

Documents 0

Integrations

Unit Scopes > Develop and apply thinking and problem solving skills (BSBCRT201) > Fees

State	Name	Debtor	Type	Ledger Code	Job Account	Amount	Tax	Tax %	Tax Amount	Total (incl. tax)
No Fees created										

Unit Scopes > Develop and apply thinking and problem solving skills (BSBCRT201) > New Fee

State: Queensland

Name:

Debtor:

*Type: Tuition Fee

*Ledger Code: Enrolment Fees (123456)

Job Account:

*Amount: 150

Tax: GST Free

Tax %: 0.00

Tax Amount: 0.00

Total (Incl. tax): 150.00

Enabled: ☒

create

Lets go do it!

Let's take a look at:

- Create an enrolment fee



Nominal Hours

Nominal Hours

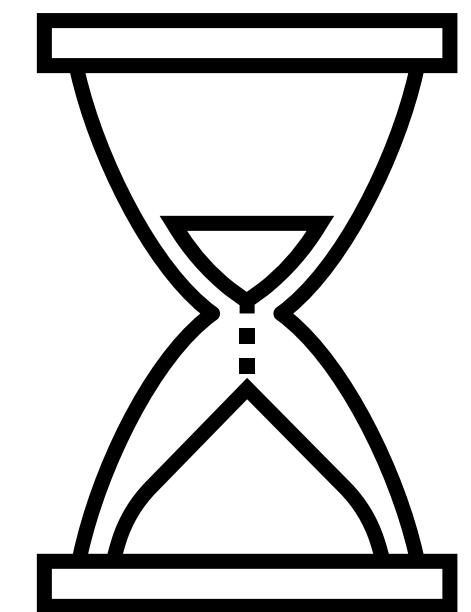
If the value is '0', then the field *MUST* be recorded as '0000'

Program level nominal hours must not exceed 6000

For a subject level *MUST* not exceed 1500 hours

This is *NOT* required if Subject is listed on training.gov.au

Reference: https://desbt.qld.gov.au/__data/assets/pdf_file/0017/10169/avetmiss-data-reporting-requirements_v9.0.pdf



Nominal Hours

Curriculum - Program

Set at the program level under compliance/funding in program creation wizard

Administration > Curriculum > program type

New Program

PROGRAM TYPE DETAILS COMPLIANCE/FUNDING ACADEMIC PERIODS SUBJECTS UNITS DELIVERY STAFF

Ensure that all details are present and correct. Much of this is used for compliance reporting or funding submissions so it is important that you enter data accurately.

[< Back](#) [Cancel](#) [Next >](#)

Compliance Settings

Australia

Accredited: Yes
Status (TGA): Current
Accredited flag: ☒ ⓘ

*ANZSCO: Office Manager/512111 ⓘ

Claim Rate (\$): 0.00

Individual Unit Enrolments: ☐ ⓘ

*Nominal hours: 0

Qualification Level: Diploma/421

Recognition Status: Nationally Accredited, Traini

Report: ☒ ⓘ

RPL: ☐ ⓘ

Volume of Learning: ⓘ

Nominal Hours

Curriculum - Unit

Individual unit nominal hours defined within each unit

Administration > Curriculum > Unit > select unit > Settings

The screenshot shows the 'Unit Edit' interface with the 'Settings' tab selected. The left sidebar contains navigation options: Unit, Details, Elements, Programs (1), Requisites, Fees, Notes / Checklists (0), Documents (0), and Integrations. The main content area has tabs for Details, Compliance, Settings (active), and Complex Prerequisite Rules. The 'Settings' tab contains the following fields:

- *Default Nominal Hours: 40 (highlighted with a red box)
- Points: [empty field]
- Expiry: [empty field]
- South Australia: [empty field]
- Tasmania: [empty field]
- Western Australia: [empty field]
- Queensland: [empty field]
- Victoria: [empty field]
- New South Wales: [empty field]
- Australian Capital Territory: [empty field]
- Northern Territory: [empty field]
- Supervised Hours: [empty field]
- Expires after: [empty field] day [dropdown arrow] [info icon]
- Exclude from Overall Score Calc: [checkbox] [info icon]
- Hide from Student Portal: [checkbox] [info icon]

At the bottom of the main content area are 'Save' and 'Cancel' buttons.

Enrolment - Unit

Community > List All > select
student > select enrolment > unit >
edit



Lets go do it!

Let's take a look at:

- Update nominal hours





Enrolment

ReadyTech Education

Enrolment

Enrolments > Enrol Students

The enrolment wizard allows entry of all state-based enrolment information based on your reporting requirements

- **Learning Unique Identifier (LUI):** LUI should be included for school students or if they are wishing to build upon their QCE

New Enrolment
Spencer Smith (PAREA00045) in QLD - CSEREA00061 (BSB50120) from 1/5/2023 to 31/7/2023

COURSE **STUDENT PROFILE** **COMPANY** **ENROLMENT** **UNITS** **SCHEDULING** **OUTCOMES** **FEES** **PAYMENTS** **CONFIRM**

Cancel Back Next Confirm Now

Background

Labour Force Status: Not stated/@@
Client Identifier: 1559637
Country of Birth: Not Stated
Town/City of Birth:
Nationality: Australia
Indigenous Status: Not stated
Main Language: Not Stated
Proficiency in spoken English:

Citizenship Details

Citizenship Status: None of the above
Citizenship Effective From Date:

School Details

At School: ☐ Not Stated ☒ Yes ☐ No
School Level: Year 11/11
Year Completed:
Learner Identifier (LUI):

Disability

Disability: ☐ Not Stated ☐ Yes ☐ No

Enrolment

- **VETDSS:** RTOs delivering VET activity to school students have an obligation to report this along with additional information

New Enrolment

Spencer Smith (PAREA00045) in QLD - CSEREA00061 (BSB50120) from 1/5/2023 to 31/7/2023

COURSE

STUDENT PROFILE

COMPANY

ENROLMENT

UNITS

SCHEDULING

OUTCOMES

FEES

PAYMENTS

CONFIRM

Back

Cancel

Next

Confirm Now

Course:

CSEREA00061 / QLD

*Start Date:

1/5/2023

Program:

BSB50120 / Diploma of Business

*Target End Date:

31/7/2023

*Enrolment Status:

Active

End Date:

GPA:

0

Brand:

Course Details

Trainee/Apprentice

Claims/Funding

Finance

Higher Ed

Custom Details

Unique Student Identifier (USI)

USI functionality has not yet been activated.

Course Details

Worker Type:

New Worker

Study Mode:

Full Time

Academic:

Qualification Level:

Diploma/421

Other Academic:

VETDSS:

☐

Enrolment

- **Fee Exemption:** Add any fee exemption/ concession type identifier
- **Survey Contact Status:** Set how the student wishes to be contacted about surveys
- **Predominant delivery mode:** Define the delivery mode appropriate for the Course if different to the default Course

New Enrolment
Spencer Smith (PAREA00045) in QLD 2 - CSEREA00082 (BSB50120) from 2/5/2023 to 23/6/2023

ENROLMENT
Set specific details into this enrolment

Course: CSEREA00082 / QLD 2
Program: BSB50120 / Diploma of Business
Enrolment Status: Active
GPA: 0
Start Date: 2/5/2023
Target End Date: 23/6/2023
End Date:
Brand:

Course Details Trainee/Apprentice **Claims/Funding** Finance Higher Ed Custom Details

Contract: 2023-2024 FY (2023-2024 FY)

Queensland
Claims & Funding

Fee Exemption State: Z: No Concession
Funding Source National: 11:Commonwealth and State general purpose recurrent
Delivery Mode: Combination of internal and v
Survey Contact Status: Available for survey use
Reporting Enabled: ☒
Funding Source State: WTP: Community Training Partnerships
Eligibility Exemption Indicator: ☐
Referral:
Employment Service Provider:
Priority:

State Specific Data
FSWA Category:
Delivery Mode Predominant:

Lets go do it!

Let's take a look at:

- Enrol a student



 **readytech**



Hours Attended



ReadyTech Education

Hours Attended

Some state funded training activity may require a valid value be reported for hours attended

Community > List All > select student > select enrolment > Units > edit

More Information:
https://desbt.qld.gov.au/__data/assets/pdf_file/0017/10169/avetmiss-data-reporting-requirements_v9.0.pdf

Code	Unit	Outcome	Start Date	Target End Date	End Date
<input type="checkbox"/> BSBCRT511	Develop critical thinking in others	Competent - 20	1/8/2023		1/8/2023
<input type="checkbox"/> BSBFIN501	Manage budgets and financial plans	Competent - 20	1/8/2023		1/8/2023
<input type="checkbox"/> BSBOP501	Manage business resources	Competent - 20	1/8/2023		1/8/2023
<input type="checkbox"/> BSBUS511	Develop workplace policies and procedures for sustainability	Superseded Subject - 61	1/8/2023		1/8/2023
<input type="checkbox"/> BSBXCM501	Lead communication in the workplace	Withdrawn/discontinued - 40	1/8/2023		2/8/2023

More Details

Delivery Mode:

-- Use Enrolment Value --

Predominant delivery mode:

-- Use Enrolment Value --

Assessment Method:

-- Use Course Value --

Withdrawal/Census Date:

Resources

Trainer:

-- Use Course Value --

Assessor:

-- Use Course Value --

Enrolment Identifier:

ENREA00495BSBXCM501

Claims & Funding

Contract

2023 VIC (2023VIC)

Funding Source State:

-- Use Enrolment Value --

Funding Source National:

-- Use Enrolment Value --

Eligibility Exemption Indicator:

☐

Fee Exemption State:

-- Use Enrolment Value --

VET Disable:

☐

Workplace ABN:

Fees

Tuition Fee:

Fees (0)

International

Number Of Weeks:

Traineeship / Apprenticeship

TCID:

Delivering Org ABN:

Outcome Training Organisation:

State Specific

Unit Scheduled Hours

Unit Hours Attended:

25

Withdrawn outcome, hours required

Location:

-- Use Enrolment Value --

Fee Exemption State(Second Character)

Fee Exemption State(Second Character):

-- Use Enrolment Value --

Purchasing Contract Schedule Identifier Exclusion

Purchasing Contract Schedule Identifier Exclusion:



Traineeship/ Apprenticeship



ReadyTech Education

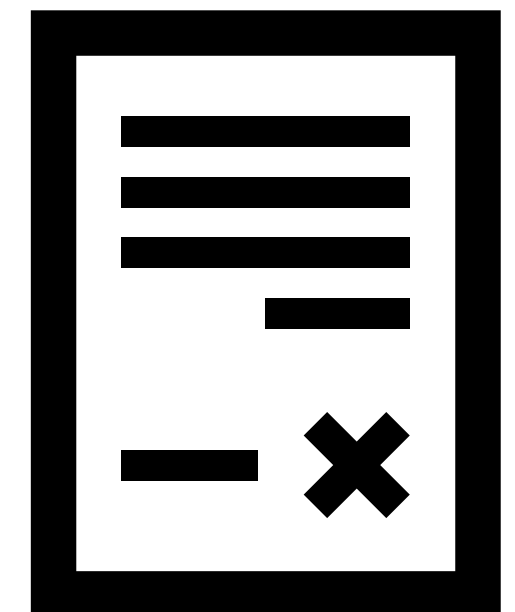
Traineeship/Apprenticeship

Some training information in SMS requires additional details for Traineeships/Apprenticeships

This is done by creating adding a trainee/apprentice record to link to your Enrolment. This will represent the Training Agreement or Contract of Training in place. All New Apprentices (Apprentices and Trainees) enter into a Training Agreement with their employer in the presence of an Apprenticeship Network Provider (ANP).

More info:

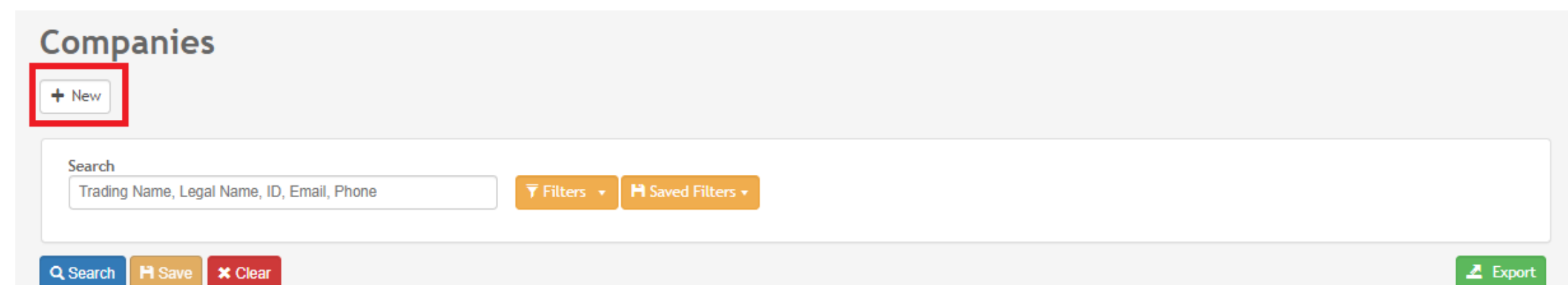
<https://desbt.qld.gov.au/training/apprentices>



Traineeship/Apprenticeship

Enrolment – Add Employer

1. Add the Company if they don't already exist
[Community > Companies > list all > + New](#)
2. Add the Company during the student's enrolment



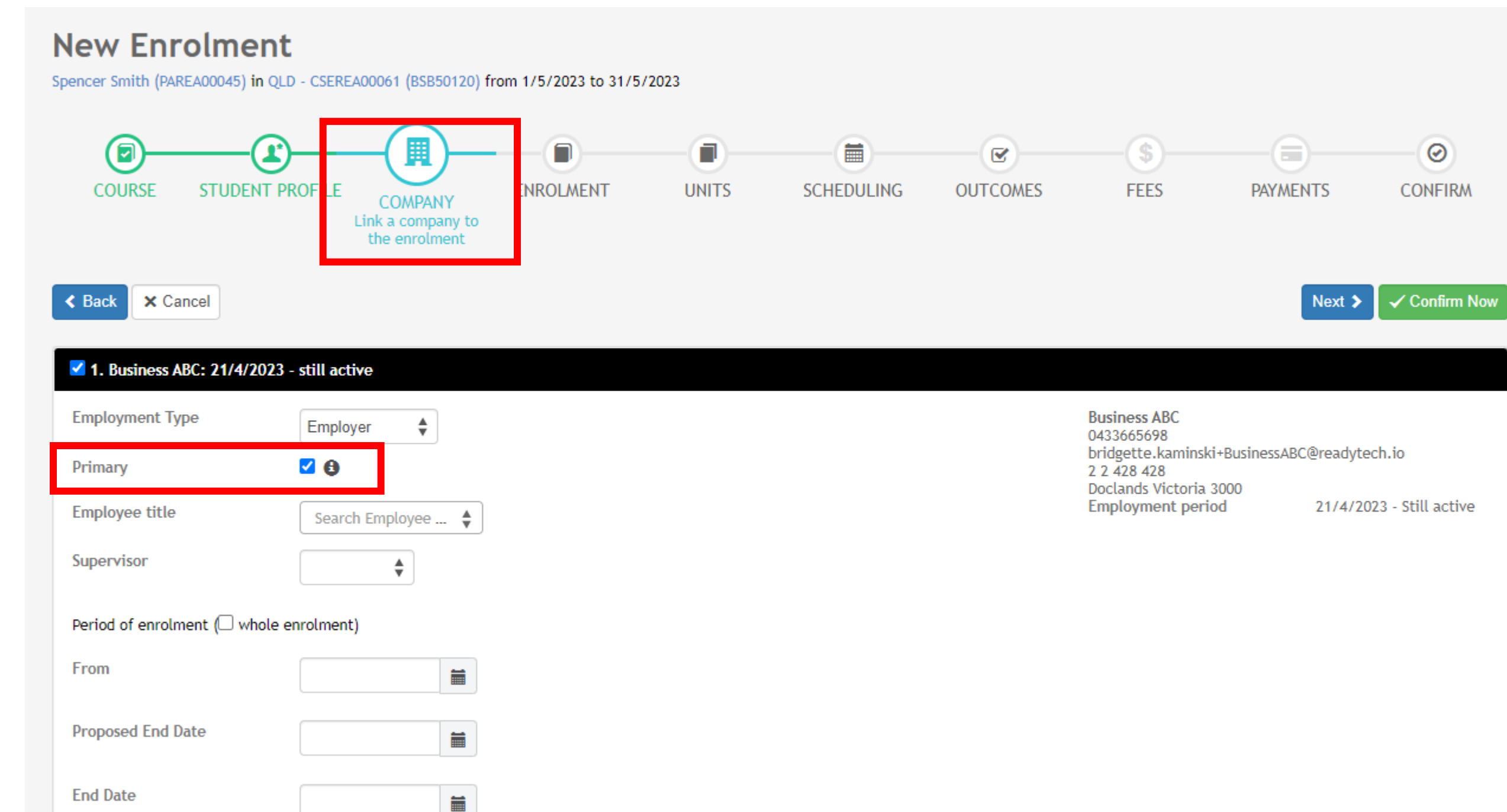
Companies

[+ New](#)

Search
Trading Name, Legal Name, ID, Email, Phone

[Filters](#) [Saved Filters](#)

[Search](#) [Save](#) [Clear](#) [Export](#)



New Enrolment

Spencer Smith (PAREA00045) in QLD - CSERE00061 (BSB50120) from 1/5/2023 to 31/5/2023

[COURSE](#) [STUDENT PROFILE](#) **[COMPANY](#)** [ENROLMENT](#) [UNITS](#) [SCHEDULING](#) [OUTCOMES](#) [FEES](#) [PAYMENTS](#) [CONFIRM](#)

[Back](#) [Cancel](#) [Next](#) [Confirm Now](#)

☒ 1. Business ABC: 21/4/2023 - still active

Employment Type [Employer](#)

Primary ☒ ⓘ

Employee title [Search Employee ...](#)

Supervisor [Supervisor](#)

Period of enrolment ☐ whole enrolment

From [From](#)

Proposed End Date [Proposed End Date](#)

End Date [End Date](#)

Business ABC
0433665698
bridgette.kaminski-BusinessABC@readytech.io
2 2 428 428
Doclans Victoria 3000
Employment period 21/4/2023 - Still active

Traineeship/Apprenticeship

Enrolment – Add Trainee/Apprentice

Add the Trainee/Apprentice to the enrolment under the Trainee/Apprentice tab

New Enrolment
Spencer Smith (PAREA00045) in QLD - CSEREA00061 (BSB50120) from 1/5/2023 to 31/5/2023

COURSE **STUDENT PROFILE** **COMPANY** **ENROLMENT** **UNITS** **SCHEDULING** **OUTCOMES** **FEES** **PAYMENTS** **CONFIRM**

ENROLMENT
Set specific details into this enrolment

[Back](#) [Cancel](#) [Next](#) [Confirm Now](#)

Course: CSEREA00061 / QLD *Start Date: 1/5/2023

Program: BSB50120 / Diploma of Business *Target End Date: 31/5/2023

*Enrolment Status: Active End Date:

GPA: 0 Brand:

Course Details **Trainee/Apprentice** Claims/Funding Finance Higher Ed Custom Details

+ New

This enrolment does not have any traineeship/apprenticeship yet, click New button to create one.

Traineeship/Apprenticeship

Enrolment – Enter Trainee/Apprentice

- **TCID (Training Contract Identifier):** Regn No
- **Type:** Note if they are an Apprentice, pre-Apprentice or Trainee
- **AASN (Australian Apprenticeship Support Network):** optional field where you select the AASN
- **Active:** You must have at least one active record
- **Date:** Record all the key dates

NOTE! At this point you will be unable to select the employer

Trainee/Apprenticeship #1 - Active

Details

TCID:

Type:

AASN:

Mode:

Active: ☒

End Reason:

Employer

Employer:

Host Employer:

Secondary School:

Training Contract

Training Plan Signed:

Initial Skills Assessment:

Training Provider:

Contract Start Date:

Contract End Date:

Contract Status Date:

Contract Status:

Contract State:

Key Dates

How long is the Traineeship/Apprenticeship?

Finance

Annual Leave Balance:

Personal Leave Balance:

Pay Rate:

Traineeship/Apprenticeship

Enrolment – Complete Enrolment

Finish entering all enrolment details

Create

Steps must now be taken in the party record

New Enrolment

Spencer Smith (PAREA00045) in QLD - CSEREA00061 (BSB50120) from 1/5/2023 to 31/5/2023

The following Warnings are present:

- You need to select a AAC if this enrolment is an Apprenticeship/Traineeship Training Contract.
- You need to select a Type if this enrolment is an Apprenticeship/Traineeship Training Contract.
- No Academic selected for this enrolment
- AVETMISS - You need to enter a TCID if this enrolment is an Apprenticeship/Traineeship Training Contract.

COURSE

STUDENT PROFILE

COMPANY

ENROLMENT

UNITS

SCHEDULING

OUTCOMES

FEES

PAYMENTS

CONFIRM

Cancel

Back

Create

Person

First Name(s):

Spencer

Surname:

Smith

Gender:

Male

Party ID:

PAREA00045

Date of Birth:

1 March 1990

Email:

Bridgette.kaminski+SpencerSmith@readytech.io

Companies

Company:

Business ABC (Primary)

Employee Title:

Course

Course:

QLD

Program:

Diploma of Business

Start Date:

1/5/2023

Target End Date:

31/5/2023

Core Units:

5

Elective Units:

7

Stream Units:

0

Additional Units:

0

Enrolment Details

ENREA00346 / Spencer Smith (PAREA00045)

Student:

Spencer Smith (PAREA00045)

Enrolment ID:

ENREA00346

Course:

CSEREA00061 / QLD

Start Date:

1/5/2023

Program:

BSB50120 / Diploma of Business

Target End Date:

31/5/2023

Enrolment Status:

Active

End Date:

GPA:

0

Brand:

Summary

Units

0%

Total Units: 12

Total Units Completed: 0

Attendance

0.00%

Scheduled Hours: 0.0

Attended Hours: 0.0

Invoiced

100.0%

Total Projected: \$15000.00

Total Invoiced: \$15000.00

Claims

0%

Total Claims: 12

Total Invoiced: 0

Course Details

Trainee/Apprentice

Claims/Funding

Finance

Higher Ed

Custom Details

More

Course Details

Worker Type:

New Worker

Academic:

Other Academic:

Coordinator:

Location:

Brisbane

Study Period:

Total Number of Weeks:

Paid Number of Weeks:

Study Mode:

Full Time

Qualification Level:

Diploma/421

VETiS:

Course Type:

Not Specified

Study Reason:

COE ID:

COE Status:

Traineeship/Apprenticeship

Add Employer to Trainee/Apprentice

Community > List All > select student > select enrolment > Edit > Trainee/Apprentice > Employer

The enrolment will need to be edited to attach the Students Employer within Trainee/Apprentice section

You may also need to update and/or add additional details

NOTE! An employer must first be assigned to be able to select it. This was done during the enrolment wizard. If you did not, see next slide.

The screenshot shows the 'Enrolment Edit' interface for a student named Spencer Smith (PAREA00045). The 'Trainee/Apprentice' tab is selected, and the 'Employer' field is highlighted with a red box. The form includes various fields for course details, enrolment status, and training contract information.

Enrolment Edit ENREA00346 / Spencer Smith (PAREA00045)

Save Cancel

Course: CSREA00061 / QLD *Start Date: 1/5/2023

Program: BSBS50120 / Diploma of Business *Target End Date: 31/5/2023

*Enrolment Status: Active End Date:

GPA: 0 Brand:

Course Details Trainee/Apprentice Claims/Funding Finance Higher Ed Custom Details

+ New

Trainee/Apprenticeship #1 - Active

Details

TCID: Training Plan Signed:

Type: Initial Skills Assessment:

AASN: Training Provider: Start Typing...

Mode:

Active: ☒ End Reason:

Employer

Employer: Business ABC x

Host Employer: Start Typing...

Secondary School: Start Typing...

Training Contract

Contract Start Date:

Contract End Date:

Contract Status Date:

Contract Status: Start Typing...

Contract State: Start Typing...

Key Dates

How long is the Traineeship/Apprenticeship? 1 2 3 4

Finance

Annual Leave Balance:

Personal Leave Balance:

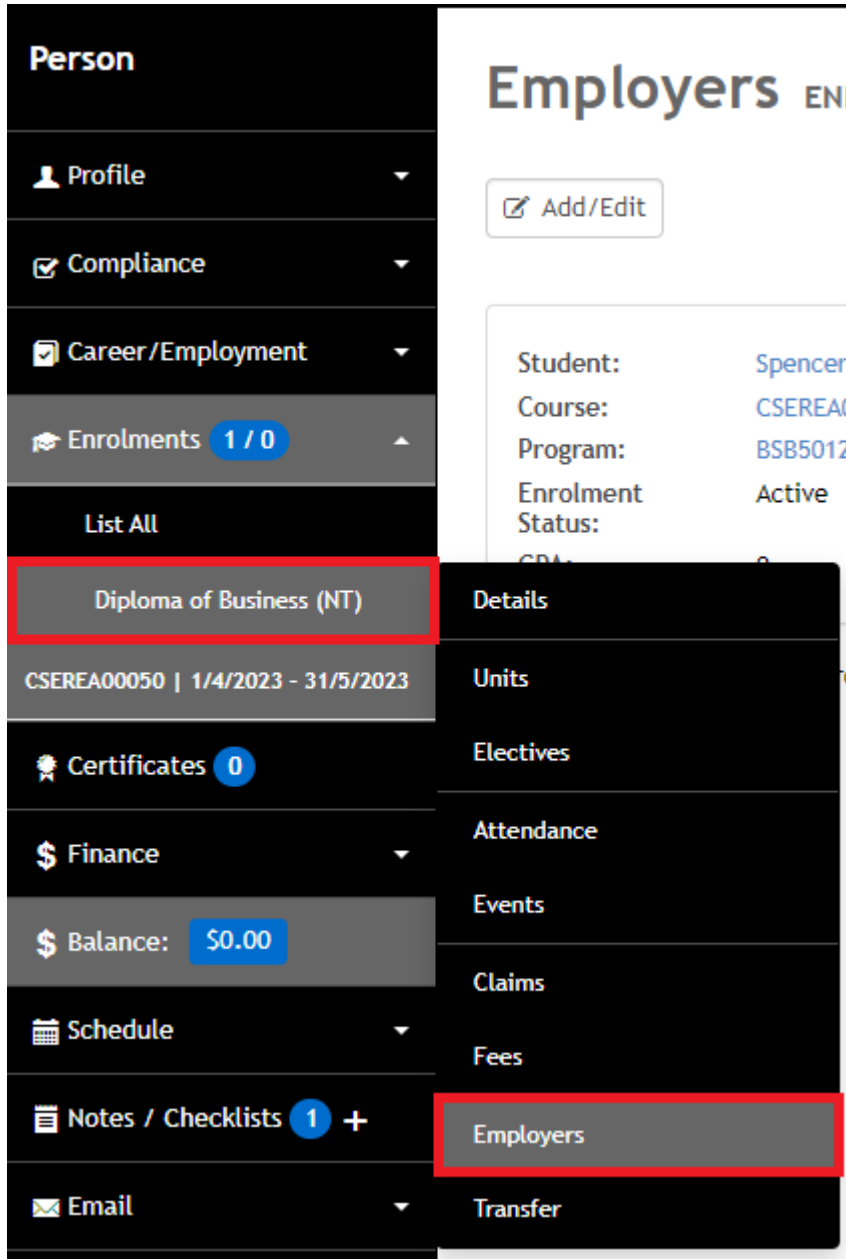
Pay Rate:

Traineeship/Apprenticeship

Enrolment – Add Employer

Community > List All > select student > select enrolment > Employers

If you don't add an employer at time of enrolment, they can be added after the enrolment has been created



Edit Employers ENREA00346 | Spencer Smith (PAREA00045)

Save

Cancel

Student: Spencer Smith (PAREA00045)

Course: CSEREA00061 / QLD

Program: BSB50120 / Diploma of Business

Enrolment Status: Active

GPA: 0

Enrolment ID: ENREA00346

Start Date: 1/5/2023

Target End Date: 31/5/2023

End Date:

Brand:

1. Business ABC: 21/4/2023 - still active

Employment Type: Employer

Primary ☒ ⓘ

Employee title: Search Employee Title...

Supervisor:

Period of enrolment ☐ whole enrolment

From: 1/5/2023

Proposed End Date: 31/5/2023

End Date:

Business ABC

0433665698

bridgette.kaminski+BusinessABC@readytech.io

2 2 428 428

Doclands Victoria 3000

Employment period 21/4/2023 - Still active

New Company:

Add

readytech

ReadyTech Education

162

Lets go do it!

Let's take a look at:

- Add a Trainee/Apprentice to a students enrolment





Training Plan

 Review Session 9.1



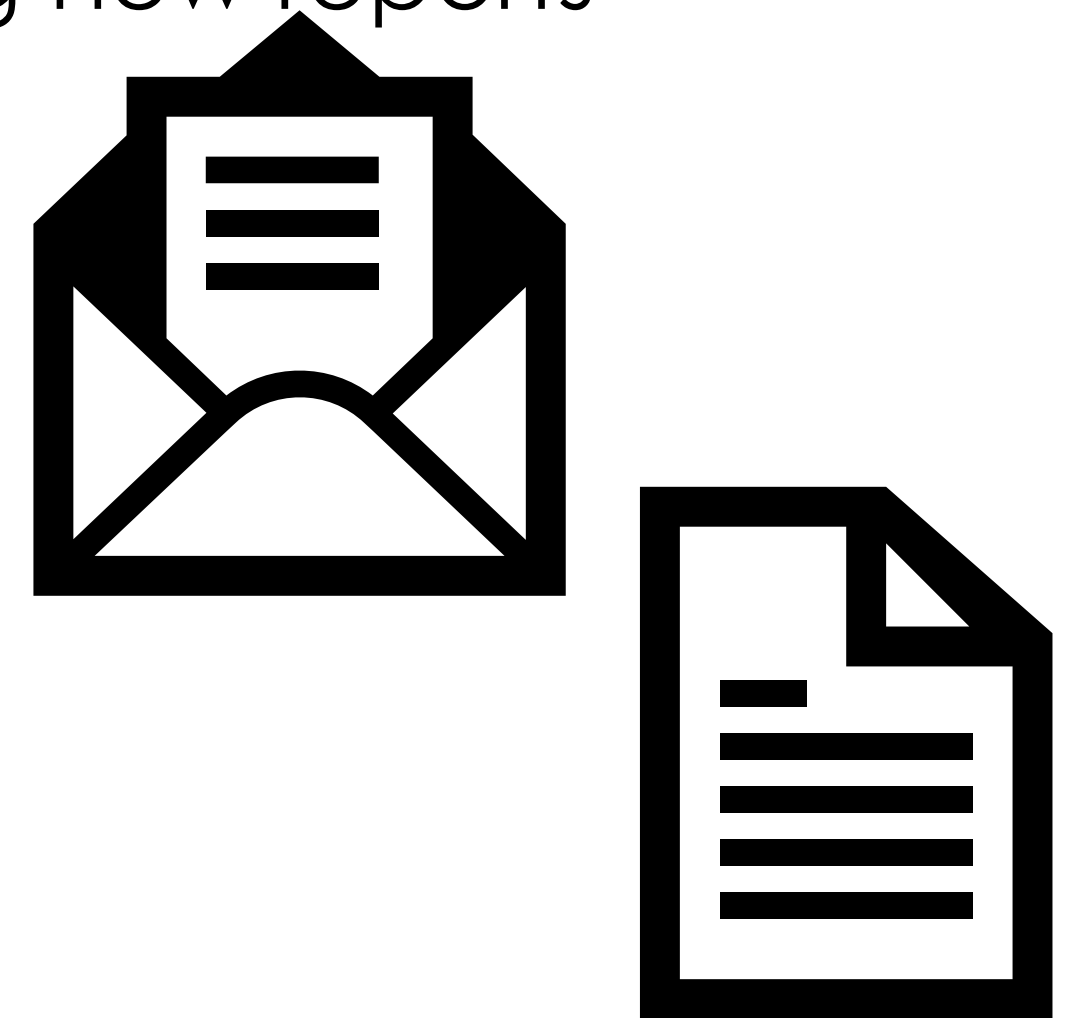
ReadyTech Education

Training Plan

A **standard** Training Template is available – please reach out to Support/Onboarding if you would like this activated in your system

If you need any bespoke changes or additional reports, speak to your onboarding consultant or support

Please note: there may be a cost associated altering reports or generating new reports



Training Plan

Any training plan templates in your SMS can be used to generate a Training Plan at an individual or course level

Community > List All > search and select party > Letters and Forms > Advanced

Course > Course List > search and select course > Letters and Forms > Advanced

Check this report meets your reporting requirements

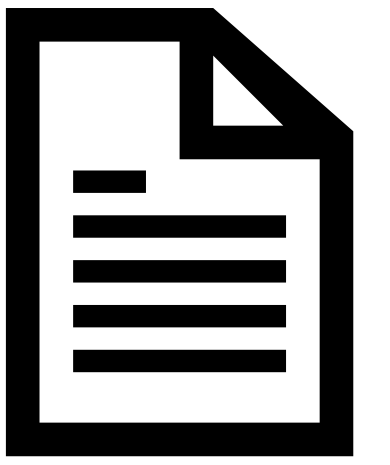
The screenshot shows a software interface for generating a Training Plan. At the top, there's a 'Preview' button and a 'Title' field containing 'Training Plan QLD v2018'. Below this is a form titled 'Apprenticeship / Traineeship Training Plan (ATF-045)' with the subtitle 'Further Education and Training Act 2014'. The form is divided into sections: 'Section 1 - Contact Details and Training Contract Information'. Under this section, there are three sub-sections: 'Apprentice / Trainee Details', 'Training Contract', and 'Employer'. Each sub-section contains fields for data entry, some with placeholder text like '{party.other_name} {party.name}'. Below the form is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough, bullet points, numbered lists, indent, outdent, link, unlink, image, etc.) and a font size dropdown set to 10pt. On the right side of the interface, there's a sidebar with 'Templates' and 'Fields' tabs. Under the 'Templates' tab, a list of training plan templates is shown: 'Student: Training Plans', 'Training Plan ACT - Skill Capital', 'Training Plan National v2018', 'Training Plan NSW v2018', 'Training Plan QLD v2018' (which is highlighted with a red box), 'Training Plan SA', and 'Training Plan VIC v2018'.



Reporting

ReadyTech Education

Reporting



“RTOs contracted with DESBT to deliver VET in Queensland, must report to the department via [Partner Portal](#); ... AVETMISS Training Activity (ATA) is a facility within Partner Portal where RTOs can upload AVETMISS data. RTOs can submit data as often as they need to, provided they comply with relevant reporting requirements outlined in DESBT funded program documentation.

Queensland RTOs that deliver non-funded training are also required to report Total VET Activity to NCVER, and can do so directly via [AVETMISS Validation Software](#) or via the ATA facility on the Partner Portal.

RTOs who deliver a combination of funded and non-funded activity, may choose to either:

- report all activity to the department
- Or
- split their return and report funded activity to the department and non-funded activity to NCVER“

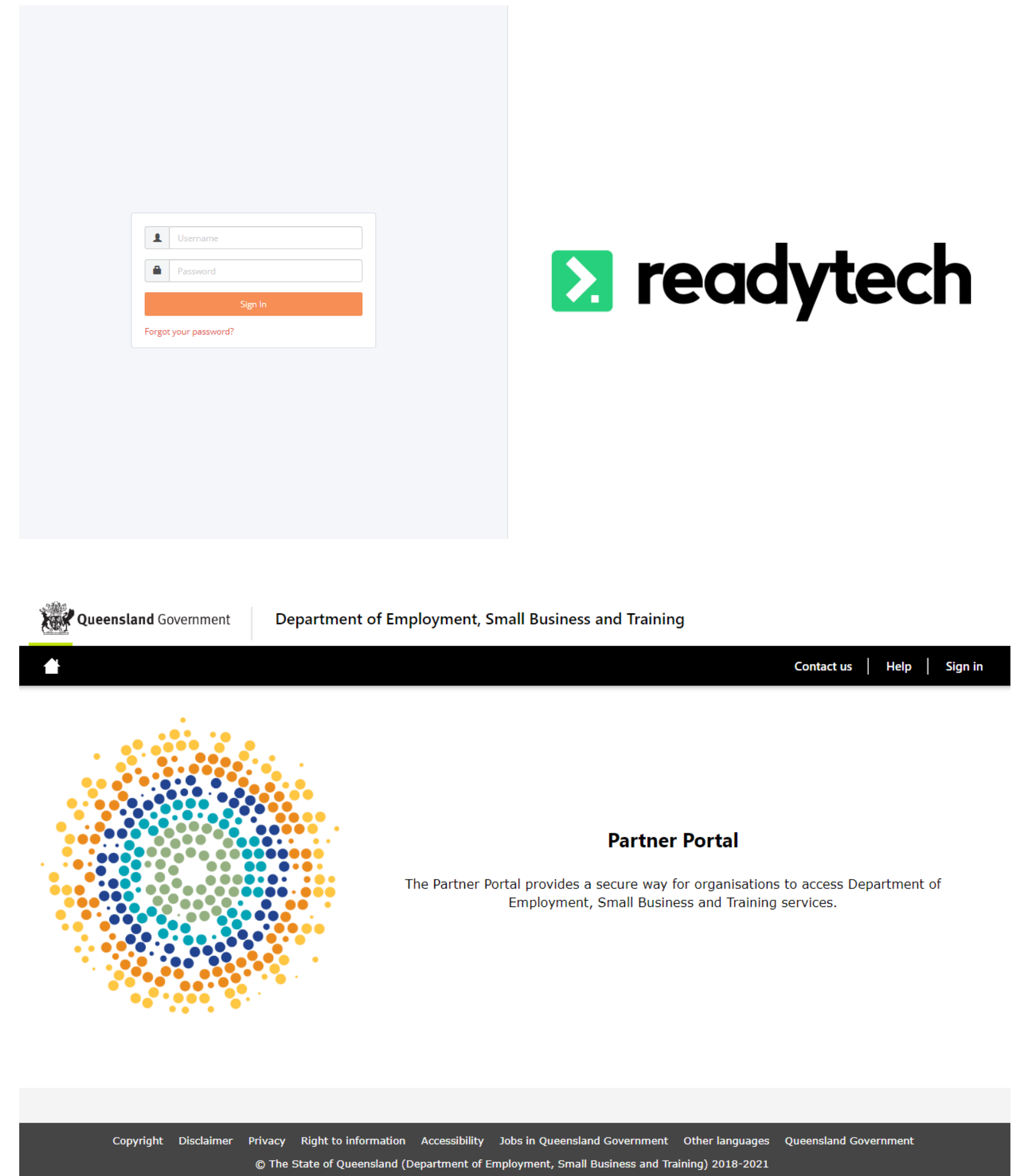
Reference: <https://desbt.qld.gov.au/training/docs-data/statistics/rto-data>

Reporting

How

To AVETMISS upload for the Department of Education, Small Business and Training (DESBT) you will need:

1. A student management system (SMS) which is capable of producing AVETMISS files
**that's us!*
2. Access to the Partner Portal

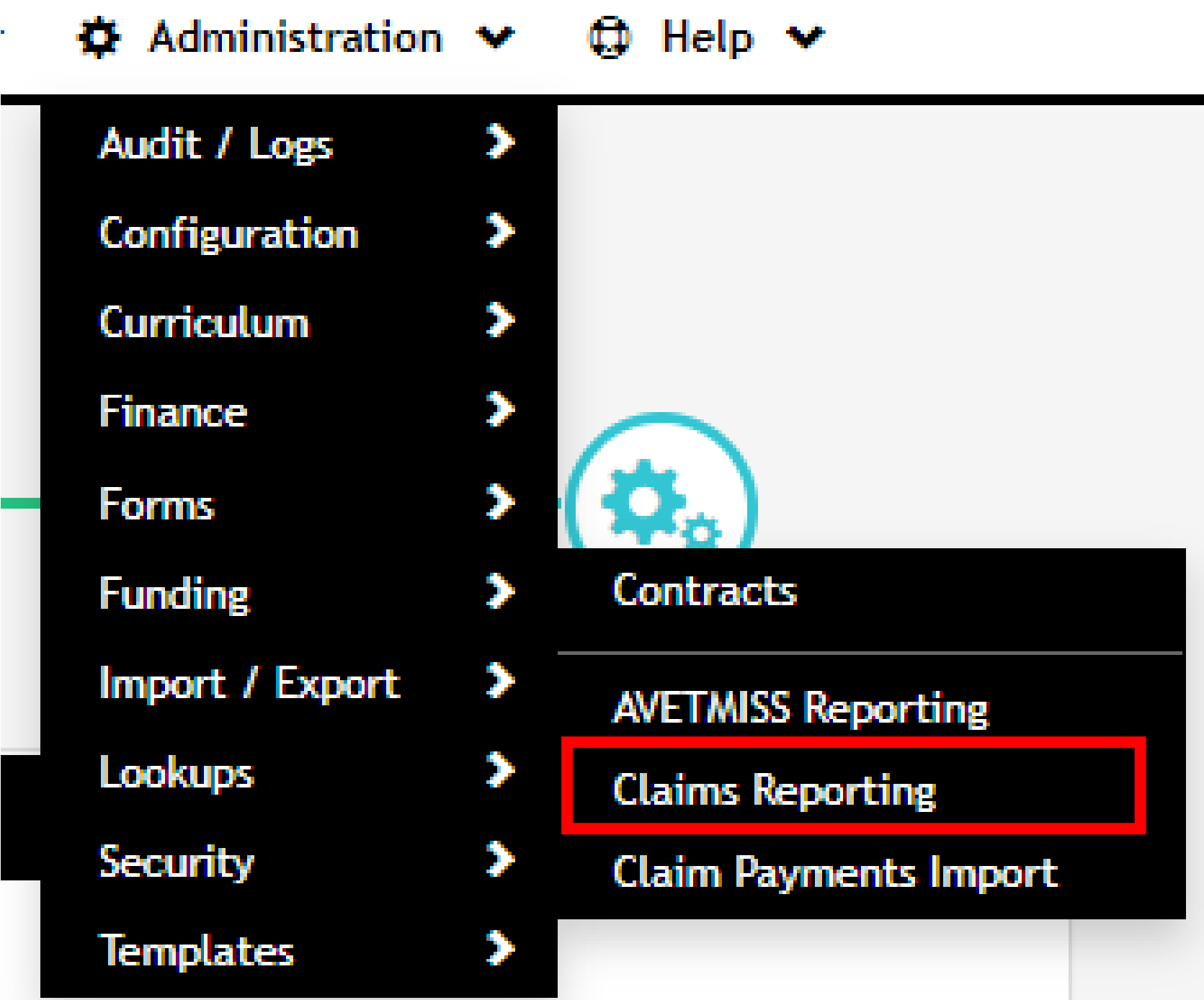


Reporting

How

The Claims Reporter is used to generate NAT files, which can be uploaded to the reporting body

Administration > Funding > Claims Reports



Claims Reports

+ New Report

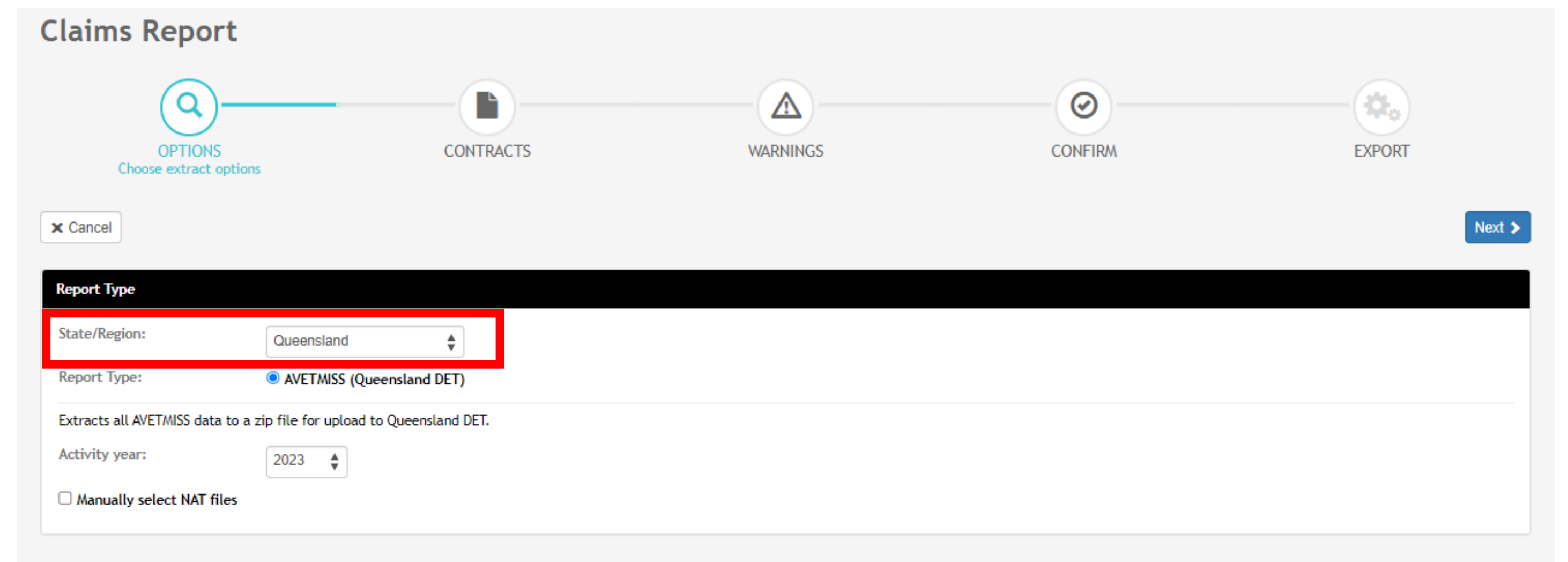
Report ID	State	Report Type	Date	Claims	Open Claims
No claim-batches found					

Claims Reports

Options

Administration > Funding >
Claims Reports

Selecting the correct state from the list will provide you with the correct reporting options for that state



The screenshot shows the 'Claims Report' interface with a progress bar at the top containing five steps: OPTIONS (active), CONTRACTS, WARNINGS, CONFIRM, and EXPORT. Below the progress bar are 'Cancel' and 'Next >' buttons. The main form area is titled 'Report Type' and contains the following fields:

- State/Region:** A dropdown menu with 'Queensland' selected. This field is highlighted with a red rectangle.
- Report Type:** A radio button selection with 'AVETMISS (Queensland DET)' selected.
- Activity year:** A dropdown menu with '2023' selected.
- ☐ Manually select NAT files

Below the 'Report Type' section, there is a descriptive text: 'Extracts all AVETMISS data to a zip file for upload to Queensland DET.'


Claims Reports


Contracts


Select the appropriate Contracts for your report


The filter option can be used to look for individual student records if required


Claims Report


OPTIONS


CONTRACTS
Choose contracts to include


WARNINGS


CONFIRM


EXPORT

✕ Cancel

← Back

Next >

Contracts

Contracts:

☒ Select all

☒ 2022-2023 FY (20222023FY)

☒ 2023-2024 FY (2023-2024 FY)

☒ QLD contract (QLDcontract)

☐ Include enrolments without a contract

☐ Include only enrolments with claiming enabled ⓘ

☐ Include ONLY enrolments that have claims due ⓘ

Filters

For advanced users only. These filters should only be used if you have a specific reporting need that requires additional filtering of the resulting data.

☐ Enrolment Filter ⓘ

☐ Course Filter ⓘ

Claims Reports

Warnings

Check for warnings

Note: the internal system checks are not exhaustive, the final source of truth is your submission to the department

Claims Report

OPTIONS

CONTRACTS

WARNINGS
Check for known warnings

CONFIRM

EXPORT

Cancel

Back

Next

Warnings

AVETMISS: Please note that these may prevent you from submitting the report to your state training authority.

Showing 20 warnings. (20 in total)

Download all warnings as CSV

Check Again

Student (20)

ENREA00273 - Hill, Hamish (PAREA00021) - Advanced Diploma of Music [Tusday] (CSEREA00045) [CUA60520]

AVETMISS - You need to enter a date of birth

AVETMISS - Highest School Level is blank. Please review before submission

AVETMISS - Indigenous Status is blank. Please review before submission

AVETMISS - Main Language is blank. Please review before submission

AVETMISS - Employment Category is blank. Please review before submission

AVETMISS - Disability is blank. Please review before submission

AVETMISS - Prior Education is blank. Please review before submission

AVETMISS - The Unique Student Identifier has not been recorded

AVETMISS - An identification record such as a passport number is required for USI application

AVETMISS - A country of birth is required for USI application

ENREA00346 - Smith, Spencer (PAREA00045) - Diploma of Business (QLD) [BSB50120]

AVETMISS - Highest School Level is blank. Please review before submission

AVETMISS - Indigenous Status is blank. Please review before submission

AVETMISS - Main Language is blank. Please review before submission

AVETMISS - Employment Category is blank. Please review before submission

Claims Report

OPTIONS

CONTRACTS

WARNINGS
Check for known warnings

CONFIRM

EXPORT

Cancel

Back

Next

Warnings

AVETMISS: Please note that these may prevent you from submitting the report to your state training authority.

You have not yet checked for warnings. Please click on the button below to check for warnings.

Check for warnings

RTO id	RTO avetmiss name	enrolment id	enrolment identifier	party identifier	enrolmen	enrolmen	enrolmen	course id	course name	course number	course code	uni
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	72	ENREA00273	PAREA00021				23		CSEREA00045	CUA60520	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	
1	ReadyTech Education	95	ENREA00346	PAREA00045				37	QLD	CSEREA00061	BSB50120	

Claims Reports

Confirm

Here you can review a quick summary of the details for your extract

The CSV of warnings can be downloaded for review

Claims Report

Q

OPTIONS

📄

CONTRACTS

⚠️

WARNINGS

✅

CONFIRM

Review and confirm extract

⚙️

EXPORT

Cancel

Back

Create

Summary

State:

Queensland

Report Type:

AVETMISS (Queensland DET)

Avetmiss Version:

8.0

Activity Year:

2023

Warnings Checked?

Y

Manually select NAT files:

N

Contracts:

• 2022-2023 FY (20222023FY)

• QLD contract (QLDcontract)

• 2023-2024 FY (2023-2024 FY)

Warnings

ⓘ There are warnings present. Please note that these may prevent you from submitting the report to your state training authority.

📄 CSV


Download all warnings as CSV


Claims Reports


Create Export

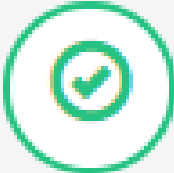
The NAT files are now available within a Zip that you can download in order to validate and then upload the reporting body


Claims Report


OPTIONS



CONTRACTS


WARNINGS


CONFIRM


EXPORT

Creation Status

 The report has been generated.

Report number: VETREA00004

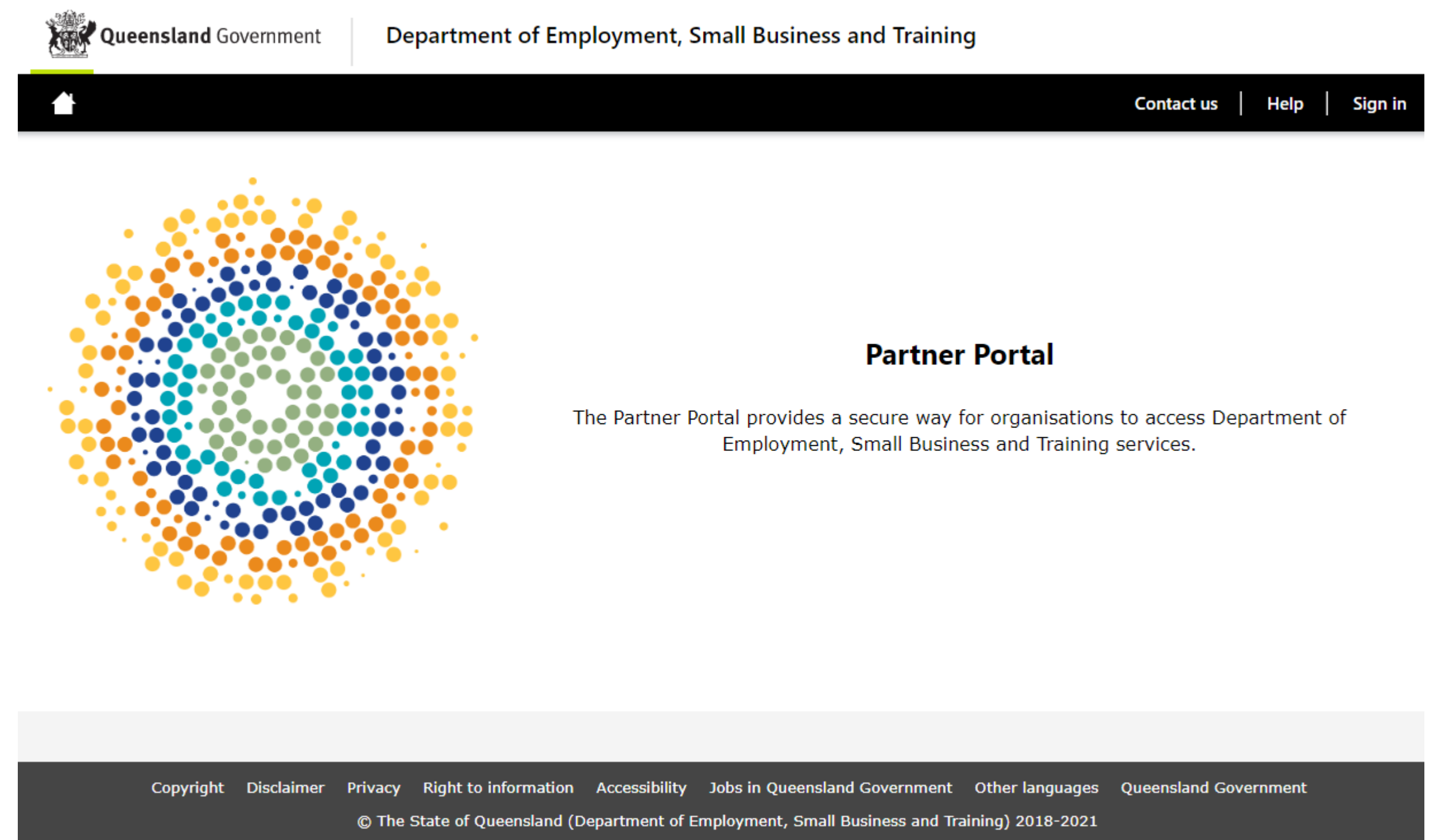
Filename: avetmiss8_1683153397.zip

Claims Reports

Submit to Department via the Partner Portal

The downloaded files can be submitted to the department by the Partner Portal

Link: <https://portal.desbt.qld.gov.au/>



Claims Reports

View Previous Exports

To view previous exports that have been created within the system

Administration > Funding > Claims Reports

Claims Reports

+ New Report

1 - 4 of 41 Page

Report ID	State	Report Type	Date	Claims	Open Claims
VETREA00004	QLD	AVETMISS (Queensland DET)	4 May 2023 8:36 AM	0	0
VETREA00003	QLD	AVETMISS (Queensland DET)	3 May 2023 4:37 PM	11	11
VETREA00002	NT	AVETMISS (NT DET)	26 April 2023 9:07 AM	12	12
VETREA00001	ACT	NAT File Export	20 March 2023 10:03 AM	15	15

1 - 4 of 41 Page

VETREA00003 Claims Reports

Edit

Delete

Summary

Report ID: VETREA00003

State: Queensland

Report Type: AVETMISS (Queensland DET)

Lodgement ID:

Date Submitted: 3 May 2023 4:37 PM

Submission File: avetmiss8_1683095854.zip

Total Submitted: \$0.00

Total Received: \$0.00

Number of Claims: 11

Number of Open Claims: 11

Number of Enrolments Reported: 2

Number of Units Reported: 7

Claims

Filter by status:

Filter

Download as: Spreadsheet

1 - 11 of 111 Page

Student/Unit	Name	Contract	Claim Status	Amount Submitted	Amount Received	Receipt #	Date Received
Hill, Hamish: Conduct musical performances (CUAMPF616)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			
Hill, Hamish: Create a final sound balance (CUASOU506)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			
Hill, Hamish: Develop advanced improvisation techniques (CUAMPF614)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			
Hill, Hamish: Develop advanced vocal techniques (CUAMPF615)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			
Hill, Hamish: Develop and implement business plans (BSBOP5601)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			
Hill, Hamish: Engage in the business of creative practice (CUAPPR613)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			
Hill, Hamish: Establish and maintain safe creative practice (CUAPPR515)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			
Hill, Hamish: Assess significance of music and apply knowledge to professional practice (CUAMLT512)	Unit Payment	2022-2023 FY (20222023FY)	Lodged	\$0.00			

Claims Reports

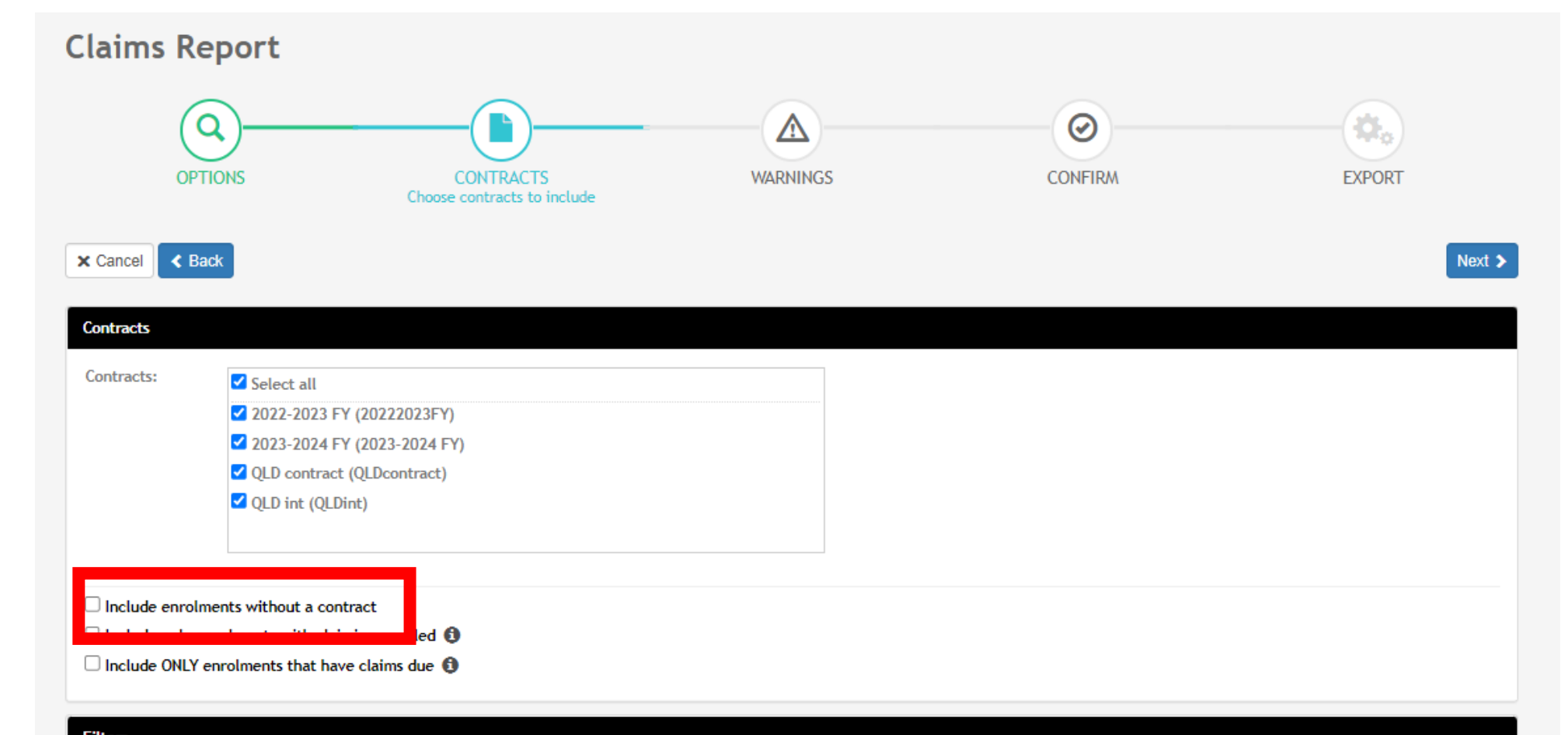
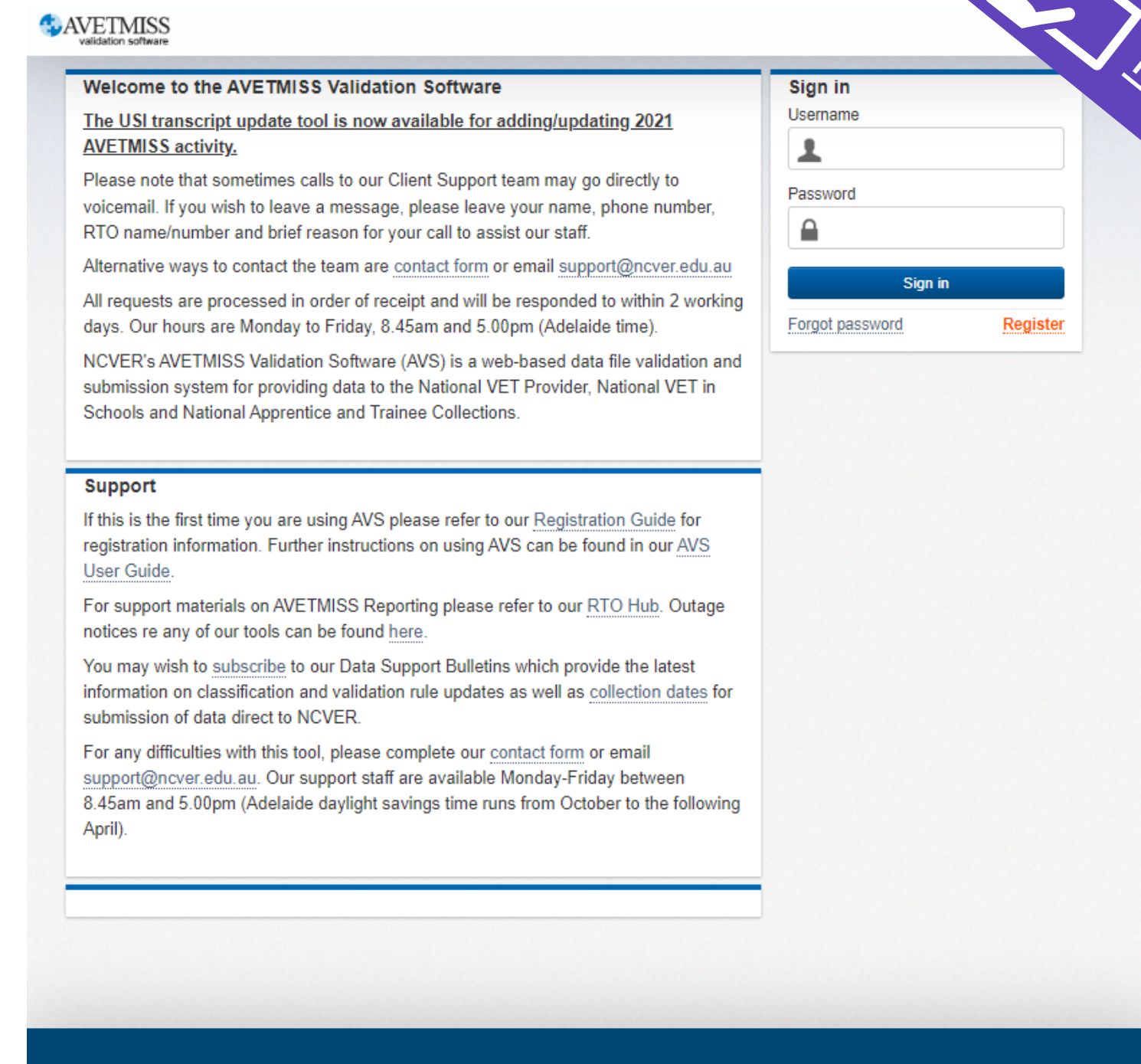
Submit to NCVER (if required)

“RTOs who deliver a combination of funded and non-funded activity, may choose to either:

- report all activity to the department (you will need to choose include enrolments without a contract)
or
- split their return and report funded activity to the department and non-funded activity to NCVER.”

Reference: <https://desbt.qld.gov.au/training/docs-data/statistics/rto-data>

If choosing to split the return you can do this using AVS



Lets go do it!

Let's take a look at:

- Run a Claims Report



 **readytech**



Claim Payment Import



ReadyTech Education

Claim Payment Import



NOTE!

This feature is optional and will not affect your government reporting.

Let's you track payments within the system – but non compulsory

Claim Payment Import

Claims Report Completed

On completion of the claims report
(Administration > Funding > Claims Reports) the
system will update the claims section of the
students enrolment

Any claims that have met the contract setup
requirements will be recorded as Lodged
Community > List All > select student > Select
Enrolment > Claims

CSEREA00050 | 1/4/2023 - 31/5/2023

Diploma of Business (QLD)

CSEREA00061 | 1/5/2023 - 31/7/2023

Employers 1 / 0

Certificates 0

Finance

Balance: \$-15000.00

Schedule

Notes / Checklists 2 +

Email

Details

Units

Electives

Attendance

Events

Claims

Invoice options

Smart Fees Invoicing

Employers

Transfer

Smith, Spencer > Claims Details > ENREA00346

Claims

BSB50120 / Diploma of Business (QLD)

Claiming

Claimable: Yes

Contract: QLD contract (QLDcontract)

Predicted Funding: \$3,000.00

Breakdown:

- Funding per unit: \$250.00
- Funded units: 12

0%

Claims

Total Claims: 12

Claims: 0

Lodged: 12

Claims Remaining: 12

Amount

Amount: \$3,000.00

Forecast: \$0.00

Lodged: \$0.00

Amount Received: \$0.00

Amount Remaining: \$3,000.00

Student Contribution

Student Contribution (Total): \$0.00

Student Contribution (Per Unit): \$0.00

Finalised Claims

No claims exist.

Scheduled Claims

Name	Associated	Contract	Due	Hours	Amount	Status
Unit Payment	Build and maintain business relationships (BSBTWK401)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Adapt organisations to enhance accessibility for people with disability (BSBxDB502)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Manage business resources (BSBOPS501)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Lead communication in the workplace (BSBXCW501)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Articulate, present and debate ideas (BSBCRT412)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Apply critical thinking for complex problem solving (BSBCRT611)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Analyse data (BSBDAT501)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Apply legal principles in contract law matters (BSBLEG522)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Apply digital solutions to work processes (BSBTEC403)	QLD contract (QLDcontract)	On Completion	\$250.00	Not yet claimable	
Unit Payment	Develop critical thinking in others (BSBCRT511)	QLD contract (QLDcontract)	3/5/2023	\$250.00	Claimable	
Unit Payment	Manage budgets and financial plans (BSBFIN501)	QLD contract (QLDcontract)	3/5/2023	\$250.00	Claimable	
Unit Payment	Develop workplace policies and procedures for sustainability (BSBSUS511)	QLD contract (QLDcontract)	3/5/2023	\$250.00	Claimable	

Claim Payment Import

View what has been Claimed

Units that have been claimed against can be viewed in an enrolment

Community > List All > select student > select enrolment > Units

Units

ENREA00346 / Spencer Smith (PAREA00045)

Edit

Student:

Spencer Smith (PAREA00045)

Course:

CSEREA00061 / QLD

Program:

BSB50120 / Diploma of Business

Enrolment Status:

Active

GPA:

0

Enrolment ID:

ENREA00346

Start Date:

1/5/2023

Target End Date:

31/7/2023

End Date:

Brand:

Summary

25.0%

Units

Total Units: 12

Total Units Completed: 3

0%

Nominal Hours

Total Hours: 150

Total Completed Hours: 0

0%

Points

Points Enrolled: 0

Points Completed: 0

Core/Elective

Term/Year

TGA Packaging Rules

Core

Expand All

Code	Unit	Outcome	Start Date	End Date	Claimed	Reported
BSBCRT511	Develop critical thinking in others (BSBCRT511)	Competent - 20	1/5/2023	3/5/2023	✓	
BSBFIN501	Manage budgets and financial plans (BSBFIN501)	Competent - 20	1/5/2023	3/5/2023	✓	
BSBOPS501	Manage business resources (BSBOPS501)	Continuing enrolment - 70	1/5/2023			
BSBSUS511	Develop workplace policies and procedures for sustainability (BSBSUS511)	Competent - 20	1/5/2023	3/5/2023	✓	
BSBVCH501	Lead communication to the workplace (BSBVCH501)					

Claim Payment Import

Open Importer

You can upload the file from the reporting body in the Claims Importer

Administration > Funding > Claim Payments Import > Queensland DET

The system matches each student found within the file uploaded

Claim Payment Import

Import Claim Payment

Import Type: Queensland DET
File: Choose file No file chosen
Upload

Claim Payment Import

Uploading Claim Payments...

Please wait: RTO: ReadyTech Education

Claim Payment Import

Upload and Review

The government spreadsheet must be in a CSV format before import

Once uploaded, you can review the values provided for Successful Matches, New Claims to Create, Errors, Warnings, and Ignored

NOTES!

If the CSV File does not match existing claims in the system, it will create a new claim record

Claim Payment Import

Uploading Claim Payments...

✓

The spreadsheet has been uploaded. Click confirm to import the payments.

Successful matches:

3

New claims to create:

0

Errors:

0

Warnings:

0

Ignored:

1

ⓘ

This spreadsheet does not contain information about when the payments were made. The date below will be used to mark imported payments.

Payment Date:

4/5/2023

Some rows have already been imported before or have no payment and will be ignored.

Confirm

1 - 4 of 4

1 Page

Row	Party	Course	Claim	Amount	Receipt	Status
2	Smith, Spencer PAREA00045	Diploma of Business (QLD)	Unit Payment - \$0.00 BSBCRT511	\$250.00	124	✓ OK
3	Smith, Spencer PAREA00045	Diploma of Business (QLD)	Unit Payment - \$0.00 BSBFIN501	\$250.00	124	✓ OK
4	Smith, Spencer PAREA00045	Diploma of Business (QLD)	Unit Payment - \$0.00 BSBSUS511	\$250.00	124	✓ OK
5	Smith, Spencer PAREA00045	Diploma of Business (QLD)	BSBOPS501	\$0.00	124	✗ Ignored

Confirm

1 - 4 of 4

1 Page

*The ignored row is due to this being a continuing result

Claim Payment Import

Confirm

Once reviewed, confirm the payments
They will be uploaded in a batch

Claim Payment Import

Uploading Claim Payments...

✓

The spreadsheet has been uploaded. Click confirm to import the payments.

Successful matches:

3

New claims to create:

0

Errors:

0

Warnings:

0

Ignored:

1

ⓘ

This spreadsheet does not contain information about when the payments were made. The date below will be used to mark imported payments.

Payment Date:

4/5/2023

Some rows have already been imported before or have no payment and will be ignored.

Confirm

1 - 4 of 4

1 Page

Batch #131960

Batch Log

Live ☒

Batch ID:	131960	Status:	Running
Log Type:	Claim Payment Import	Enqueued:	Thu 04 May 2023 08:52:46 +1000
Parameters:		Finished:	
User:	Bridgette Admin	Created On:	Thu 04 May 2023 08:52:46 +1000
		Last Updated On:	Thu 04 May 2023 08:52:46 +1000

This item is being processed now

Detailed Log

Type	Time	Message
Message	4 May 2023 8:52:47 AM	Applying 3 successful payments...
Message	4 May 2023 8:52:47 AM	Ignoring 0 warnings
Message	4 May 2023 8:52:47 AM	Ignoring 0 new claims...
Message	4 May 2023 8:52:47 AM	Ignoring 0 errors


Batch #131960

Batch Log

Batch ID:	131960	Status:	Completed Successfully
Log Type:	Claim Payment Import	Enqueued:	Thu 04 May 2023 08:52:46 +1000
Parameters:		Finished:	Thu 04 May 2023 08:52:47 +1000
User:	Bridgette Admin	Created On:	Thu 04 May 2023 08:52:46 +1000
		Last Updated On:	Thu 04 May 2023 08:52:47 +1000

Detailed Log

Type	Time	Message
Message	4 May 2023 8:52:47 AM	Processing Completed
Message	4 May 2023 8:52:47 AM	Applying 3 successful payments...
Message	4 May 2023 8:52:47 AM	Ignoring 0 warnings
Message	4 May 2023 8:52:47 AM	Ignoring 0 new claims...
Message	4 May 2023 8:52:47 AM	Ignoring 0 errors

 readytech

ReadyTech Education

186

View

You can review the changes that have been made

Community > list all > select student >
select enrolment > Claims



Lets go do it!

Let's take a look at:

- Review Claims Payment Import



 **readytech**



Funding Reports

ReadyTech Education

Funding Reports

Standard Reports

Within the standard reports, there are a reports helpful for claims reporting

Reports > Standard Reports

Reports

Academics

- Academic Detail
- Academic Matrix
- Academic Matrix: Enrolment Level
- Academic Performance

Administration

- Certificates
- Notes

Agents

- Agent Commissions
- Agent Referrals

Course

- Attendance
- Course Progress
- Events

Financial

- Attributable Revenue
- Deferred Revenue
- Expected and Actual Revenue
- Financial Reconciliation
- Outstanding Invoices

Funding

- Contract Overview
- Enrolment Claims Overview
- Outstanding Claims

Overview

- Top Courses
- Top Employers
- Top Students

Students

- Enrolment Status
- Student Completions
- Student Overview
- Student Progress
- Student Health Insurance

Custom Reports

- List All

Can't find the right report? Create your own using Report Builder.

Report Builder

Funding Reports

Contract Overview

This report will give you a report of each contract and the students under them

This will give you an overview of the:

- Amount claimed
- Amount received
- Amount scheduled

Hide filters

Report Criteria

☐ Hide Report Criteria in Download reports.

Check this box if you are going to produce this report as PDF and want the filter-criteria not to display at the top.

General Filters

Location:

State:

all

Employer:

Sales/Agent:

☒ Include Child Employers

Course Filters

Program:

Course:

Course Type:

all

Academic:

Enrolment Status:

all

Report Criteria

Study Period:

 -

Contract:

2023-2024 FY (2023-2024 FY)

Produce

Download as: PDF Document Spreadsheet

1 - 1 of 11 Page

1 - 1 of 11 Page

Funding Reports

Enrolment Claims Overview

This report will take you through more detail and break information down per unit

You can see what has been claimed and when

Hide filters

Report Criteria

☐ Hide Report Criteria in Download reports.

Check this box if you are going to produce this report as PDF and want the filter-criteria not to display at the top.

General Filters

Location:

State:

all

Employer:

Sales/Agent:

☒ Include Child Employers

Course Filters

Program:

Course:

Course Type:

all

Academic:

Enrolment Status:

all

Report Criteria

Study Period:

4/4/2023

-

4/5/2023

Contract:

2022-2023 FY (20222023FY)

Produce

Download as:

PDF Document

Spreadsheet

1 - 4 of 41 Page

Student	Party ID	Enrolment	Employer	Qualification	Start Date	End Date
Smith, Spencer	PAREA00045	ENREA00346	Business ABC (Employer)	BSB50120 Diploma of Business	1/5/2023	31/7/2023
Name	Unit	Contract	Claimed at	Predicted	Received	
Unit Payment	Develop critical thinking in others (BSBCRT511)	2022-2023 FY	3/5/2023	\$0.00	\$250.00	
Unit Payment	Manage budgets and financial plans (BSBFIN501)	2022-2023 FY	3/5/2023	\$0.00	\$250.00	
Unit Payment	Develop workplace policies and procedures for sustainability (BSBSUS511)	2022-2023 FY	3/5/2023	\$0.00	\$250.00	
Unit Payment	Lead communication in the workplace (BSBXCM501)	2022-2023 FY		\$0.00	\$0.00	
Sub-total:				\$0.00		

Lets go do it!

Let's take a look at:

- Run Standard reports
 - Enrolment Claims overview
 - Contract overview



Summary

What have we done today?

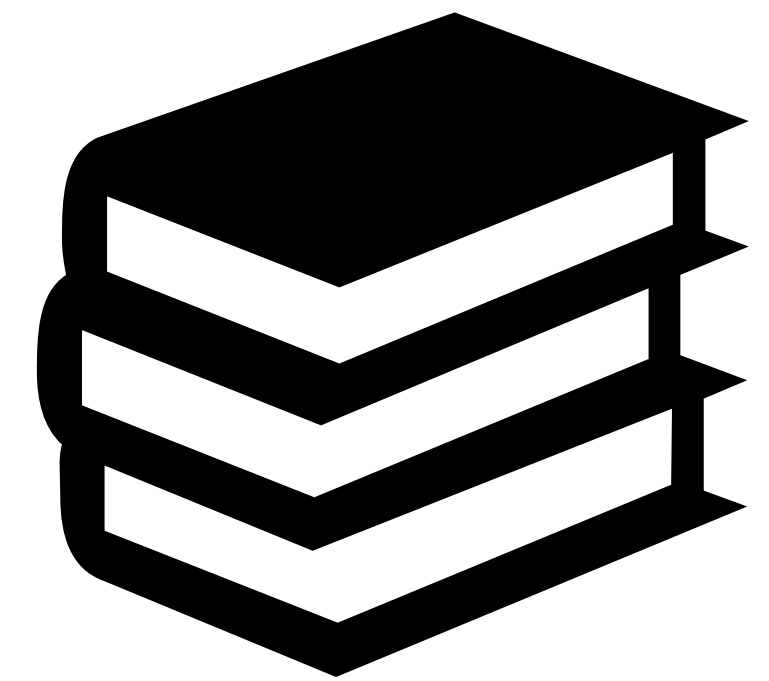
- Review list of state funding sources
- Adding Contracts and how to update contracts when they change
- Location loading
- Finance details
- How to record Nominal hours
- Hoe to create an enrolment and record hours attended
- Traineeship/Apprenticeship and how to create a training plan
- Reporting in Queensland
- Claim Payment Import
- Funding reports



Action Items

What do I need to do after today's session?

- Add in training locations
- Add all funding contracts into the system
- Setup finance details and create Smart Fee library (or libraries if required)
- Link funding contracts and smart fee library to Course
- Review contract changing process
- Create trainee/apprentice enrolment (if required)
- Enrol a student
- Submit a Claims Report
- Complete a Claims Payment Import
- Review funding reports



Enjoyed today's session?

Please navigate to article [here](#) for the STA information

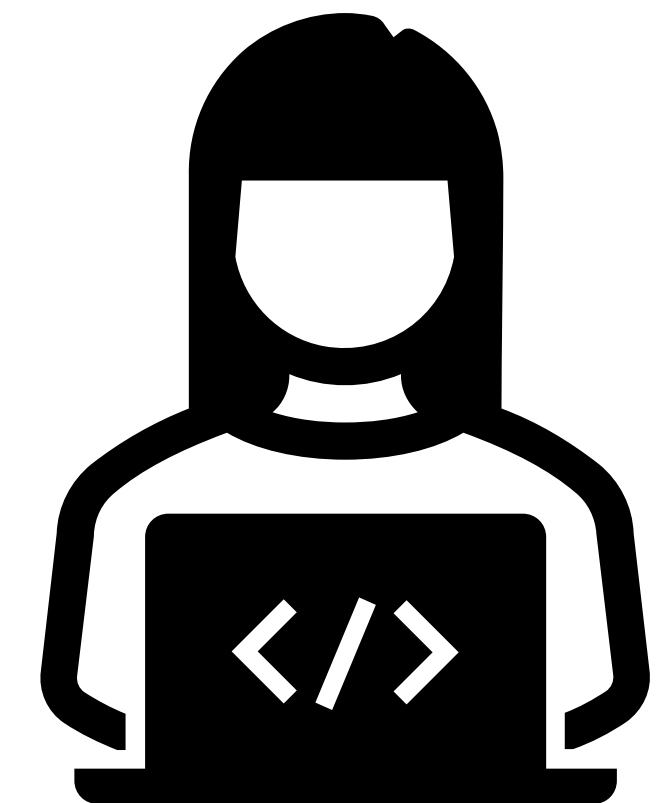
Here you will find all the information and resources for this series

- A copy of the PowerPoint slides
- Links for resources relevant to today's session
- Details on the materials required for upcoming sessions
- Booking links for upcoming sessions
- Recordings from today and previous sessions

For more information about the onboarding training sessions

[Please navigate to article here](#)

To view more information about the full training series.



Thank you

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