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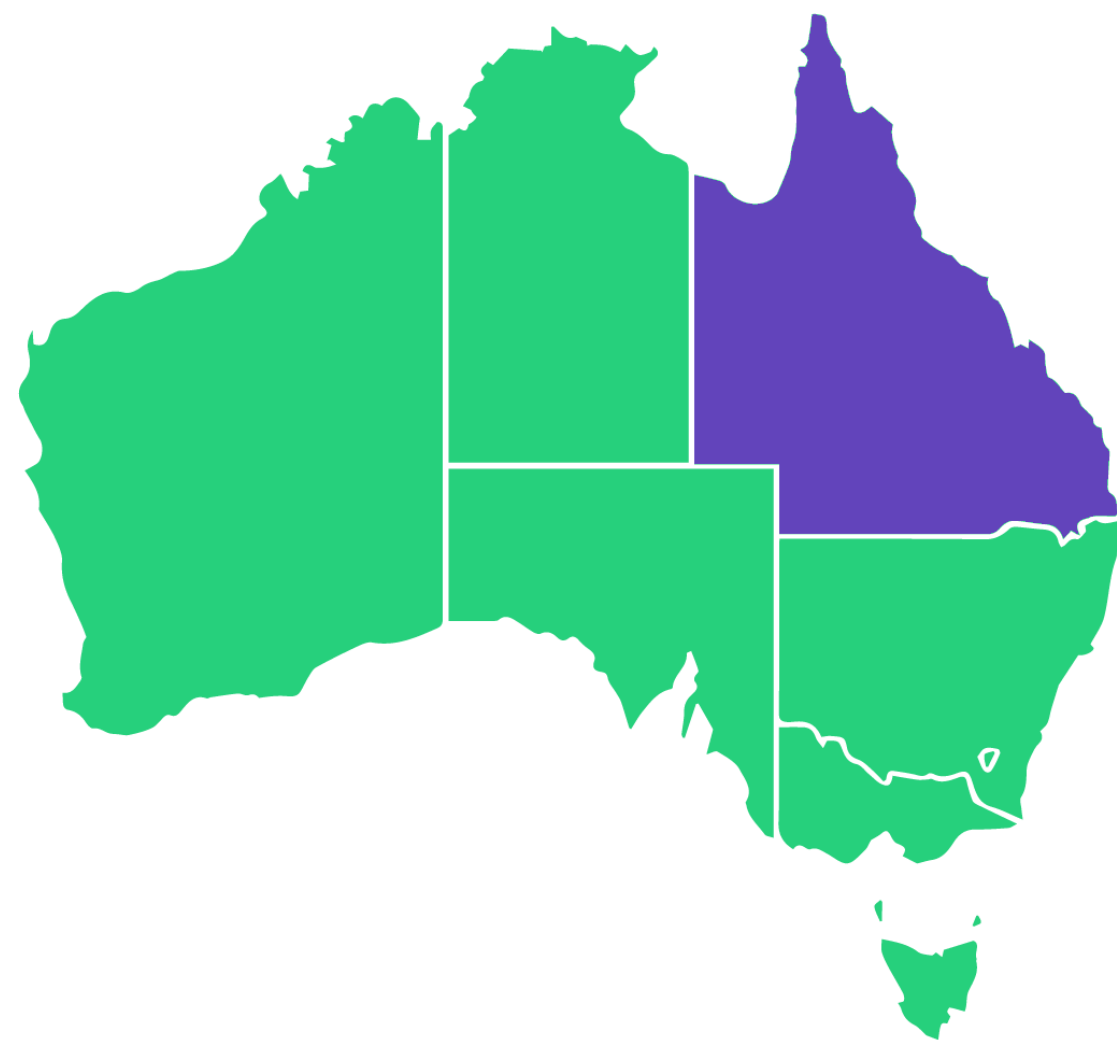
Learning Objectives	
1	To create location within the system
2	To update and create the contracts for the system
3	Create and update financial information
4	Understand how to setup Traineeships/Apprenticeships date within the system
5	Perform a claims report
6	Perform an update with the claims payment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

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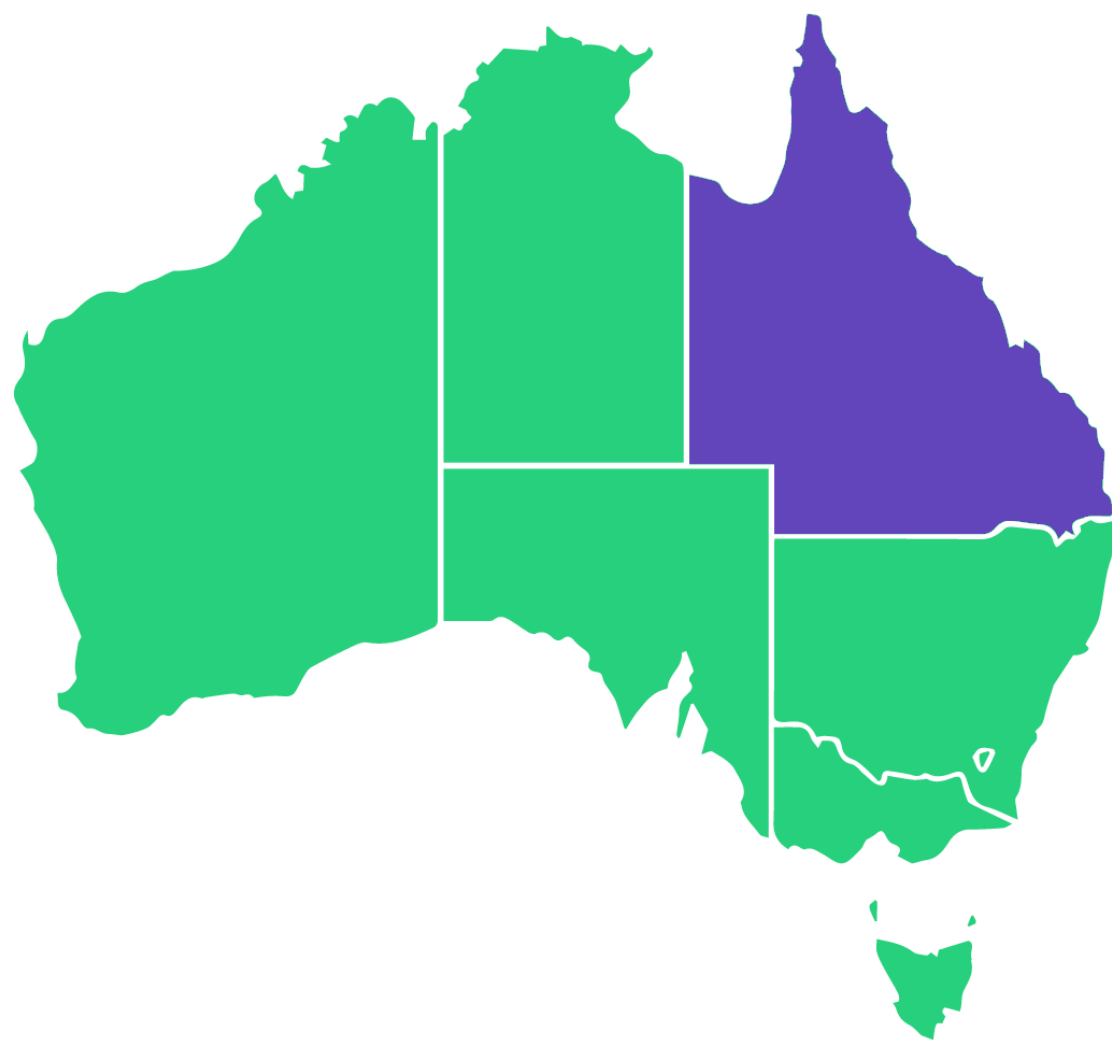
State Training Authority (STA): Department of Education, Small Business and Training (DESBT)

Reporting System: Partner Portal

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

Reporting Documentation: https://desbt.qld.gov.au/training/docs-data/statistics/rto-data
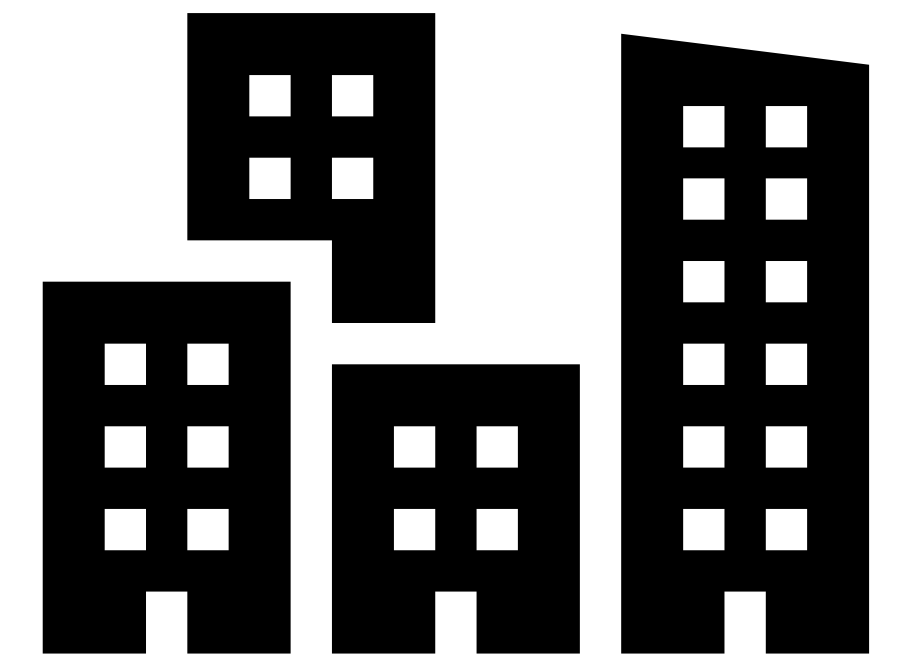
State Funding Source

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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

Lets go do it!

Let's take a look at:

- Adding a new funding source

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Contracts

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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.
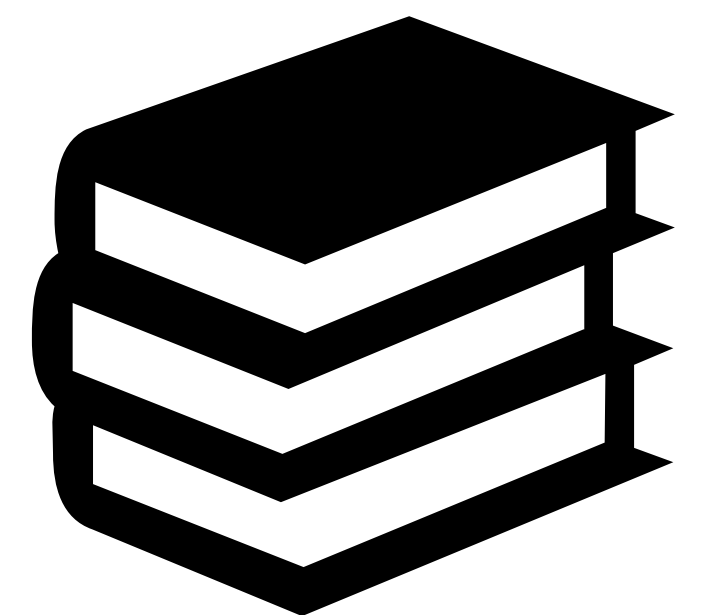
Contracts

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

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

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

Lets go do it!

Let's take a look at:

- Setup funding Contract

- Create a Course with a Contract

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Contract Change

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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
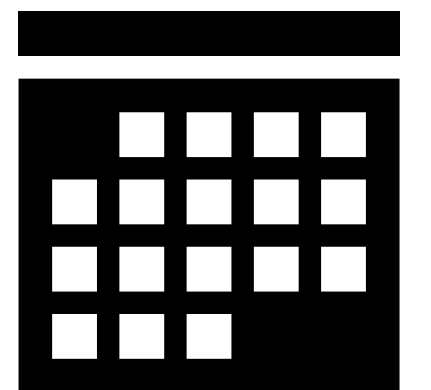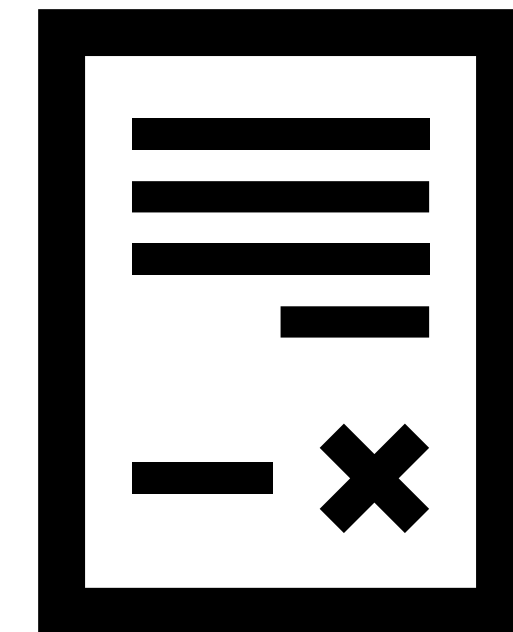
Contract Change

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

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

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
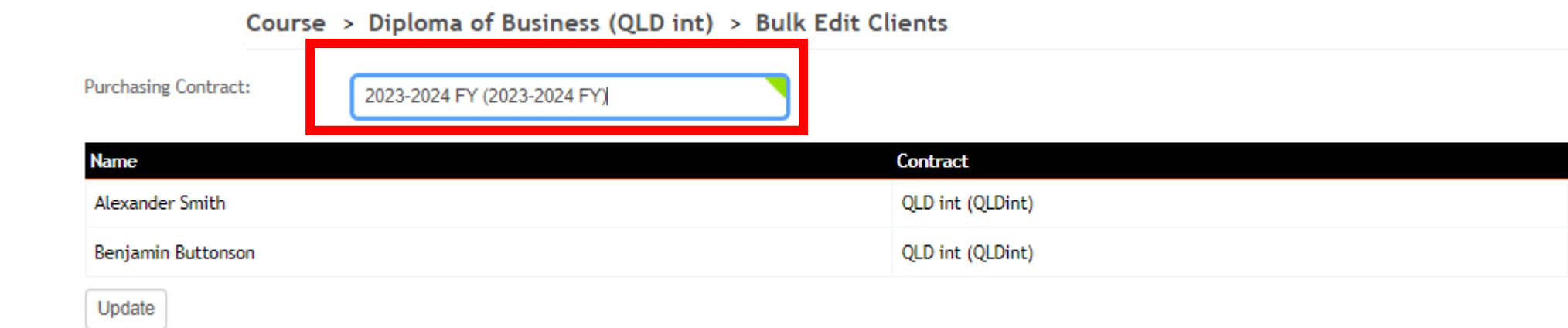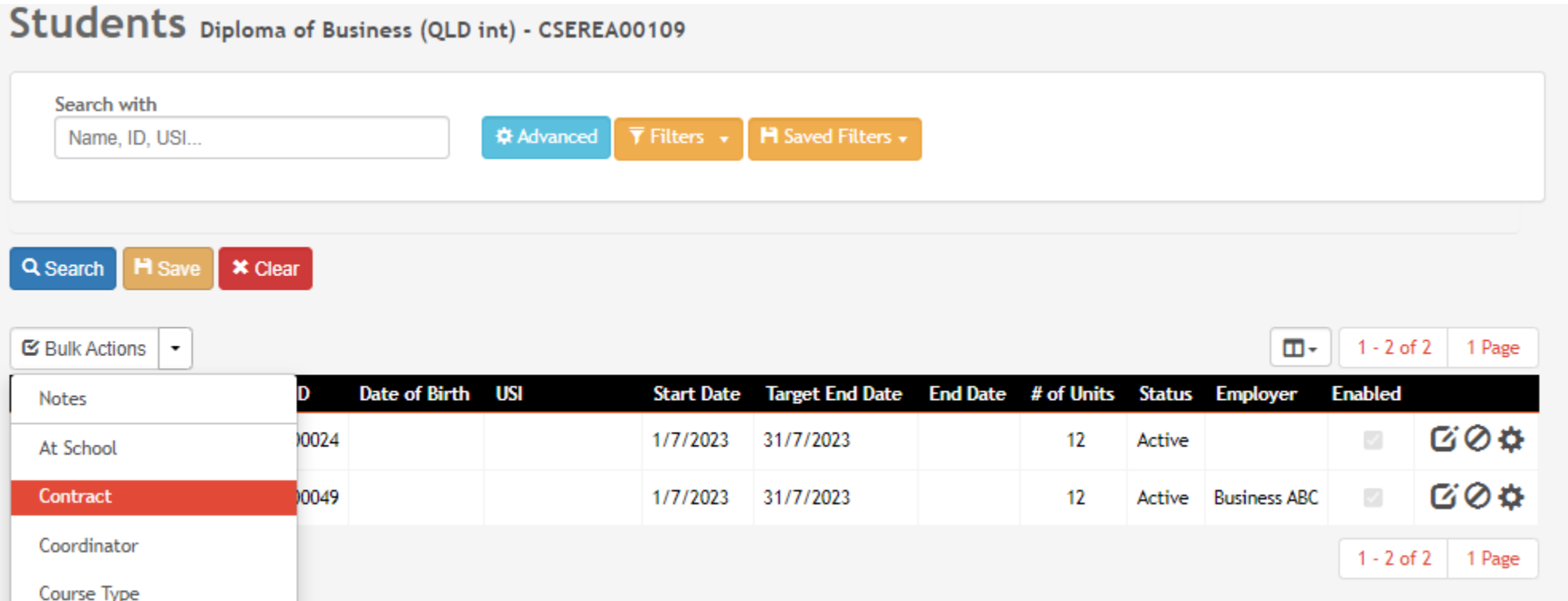
Contract Change

3. Go to the Units

Navigate to the unit section of the enrolment

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

Lets go do it!

Let's take a look at:

- Update Contract for enrolment and units

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Location Loading

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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[1] and on Palm Island[1].

*To enable payment at the quoted Training Subsidy price factor, locality names marked with an asterix 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
ABBEYWOOD			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%

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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

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

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Finance

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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
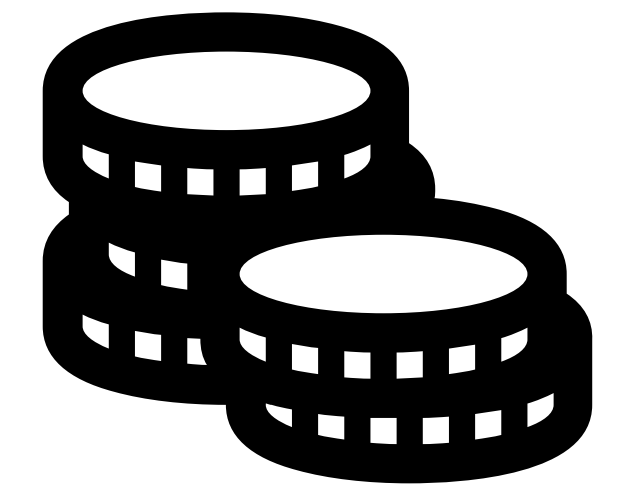
Finance

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
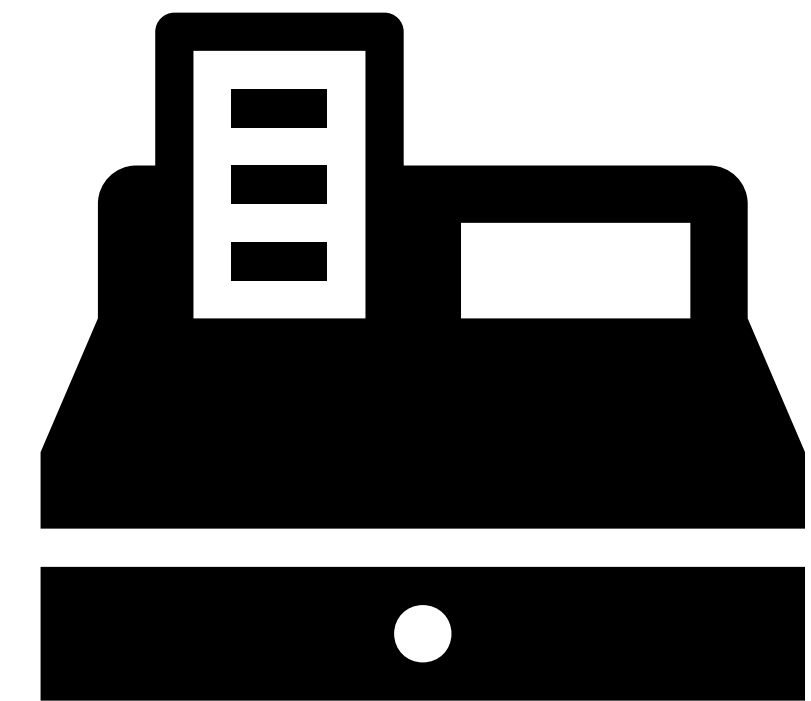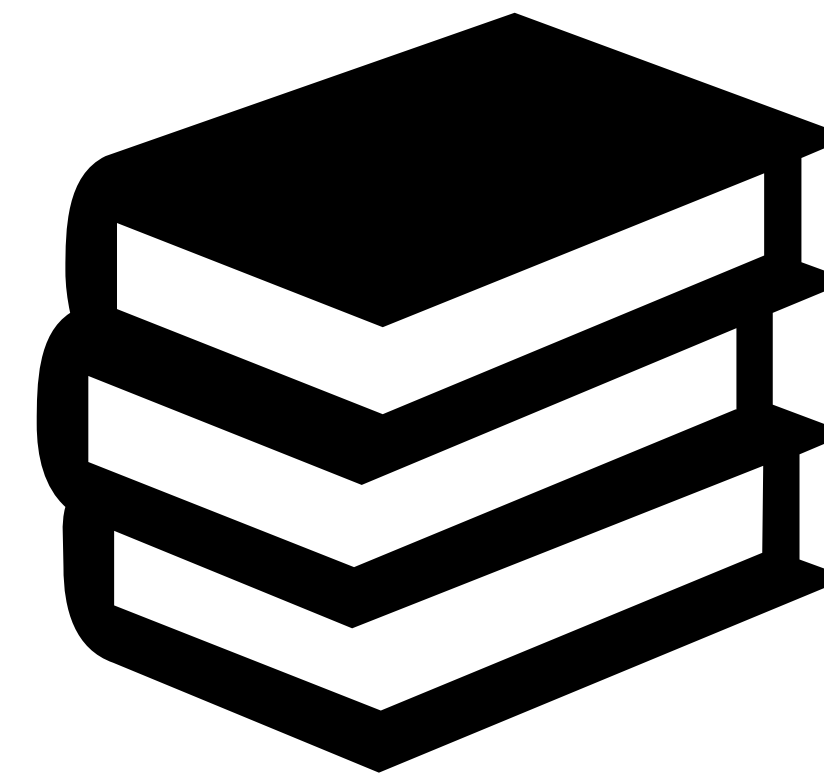
1. Smart Fee
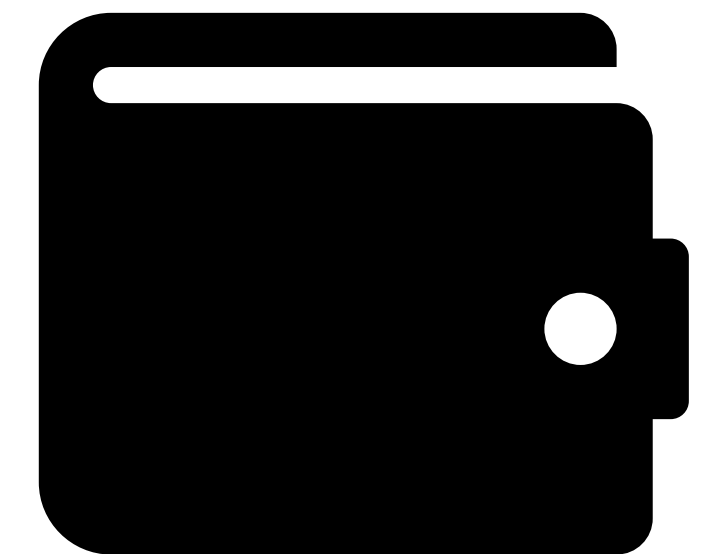
Finance

Smart Fee - Setup

Smart fees are created by:

1. Setting up a smart fee library

2. Linking to a Course
    A. Manually linking to Course
    B. Automatic Smart Fee

3. Use during enrolment

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

Finance

Smart Fee – On Enrolment

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

Enrolments > Enrol Students

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

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

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 >

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

Finance

Unit Level

At time of enrolment, you will be able to select the required fee types from the available list

Enrolments > Enrol Students

The selected fees will then be pushed through as the reporting amount

Lets go do it!

Let's take a look at:

- Create an enrolment fee

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Nominal Hours

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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
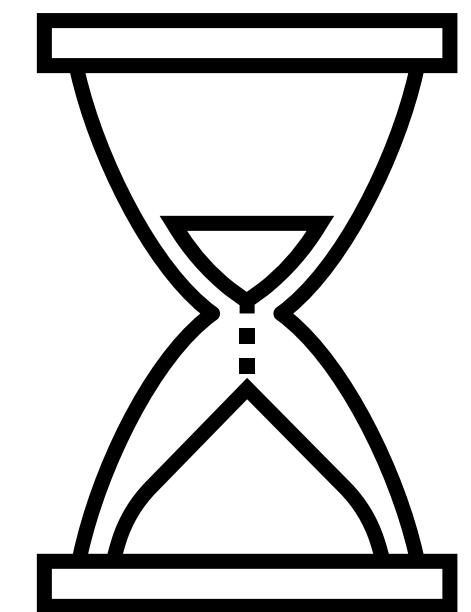
Nominal Hours

Curriculum - Program

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

Administration > Curriculum > program type

Nominal Hours

Curriculum - Unit

Individual unit nominal hours defined within each unit

Administration > Curriculum > Unit > select unit > Settings

Nominal Hours

Enrolment - Unit

You can edit this on each student's enrolment if their nominal hours differ

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

Lets go do it!

Let's take a look at:

- Update nominal hours

Enrolment

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Enrolment

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

Enrolment

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

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

Lets go do it!

Let's take a look at:

- Enrol a student

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Hours Attended

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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

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Traineeship/ Apprenticeship

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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
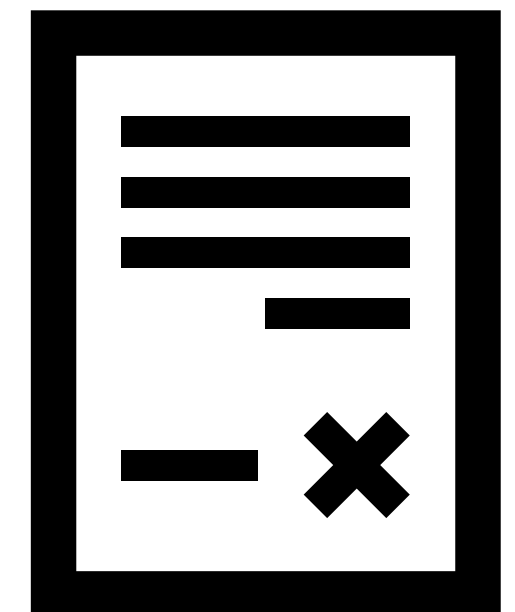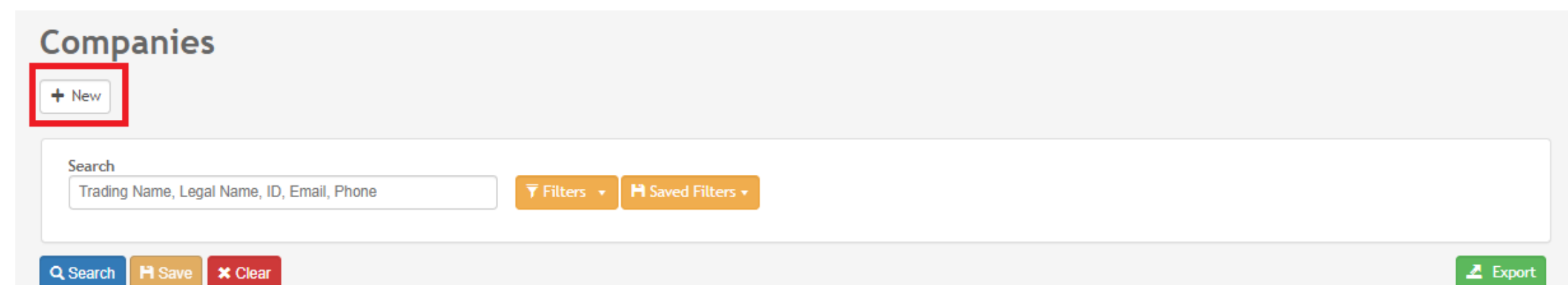
Traineeship/Apprenticeship

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

Traineeship/Apprenticeship

Enrolment – Add Trainee/Apprentice

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

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

Traineeship/Apprenticeship

Enrolment – Complete Enrolment

Finish entering all enrolment details

Create

Steps must now be taken in the party record

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.

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

Lets go do it!

Let's take a look at:

- Add a Trainee/Apprentice to a students enrolment

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Training Plan

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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
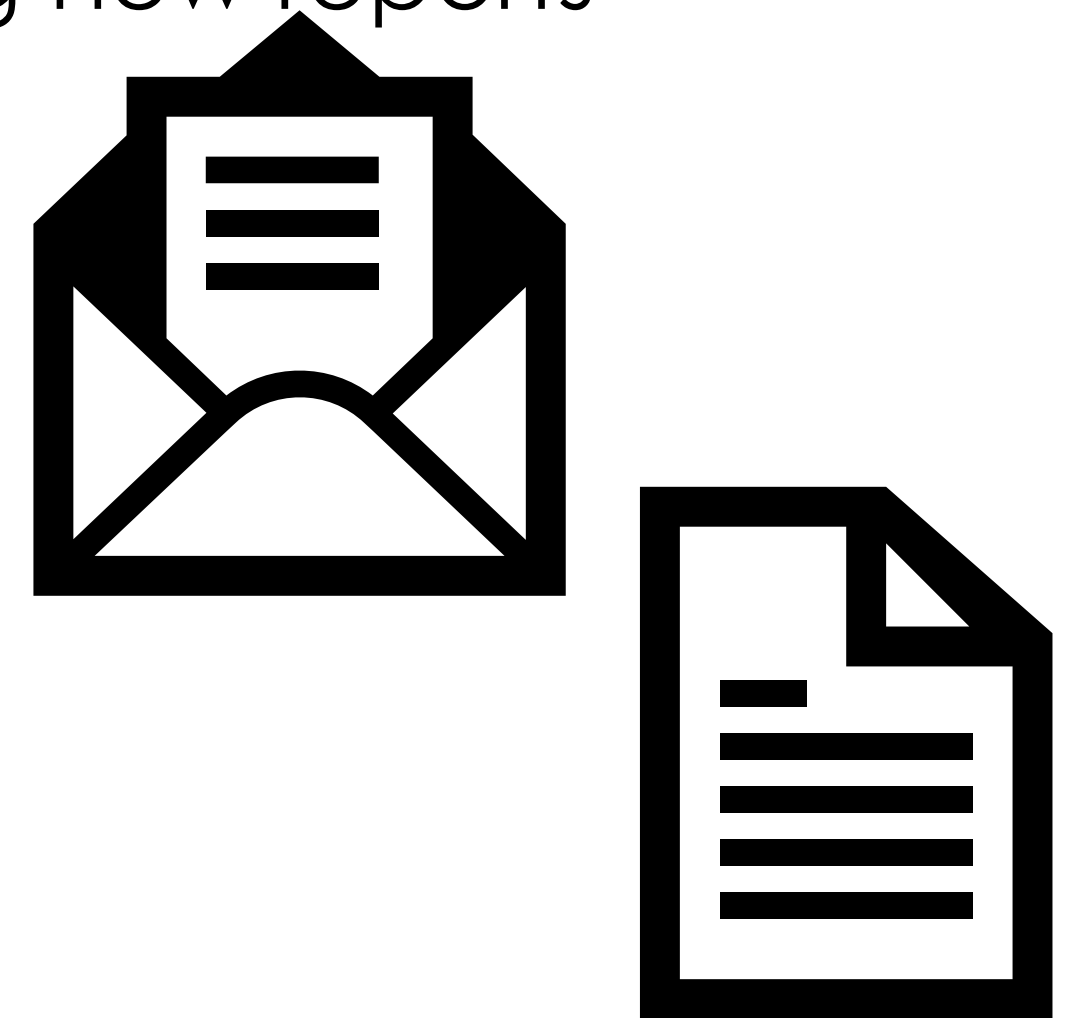
Training Plan

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

Reporting

Reporting
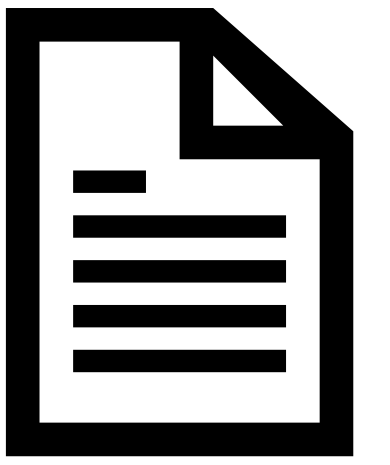
"RTOs contracted with DESBT to deliver VET in Queensland, must report to the department via Partner Portal; … AVETMISS Training Activity (ATA) is a facility within Partner Portal where RTOs can upload AVETMISS data. RTOs can submit data as often as they need to, provided they comply with relevant reporting 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
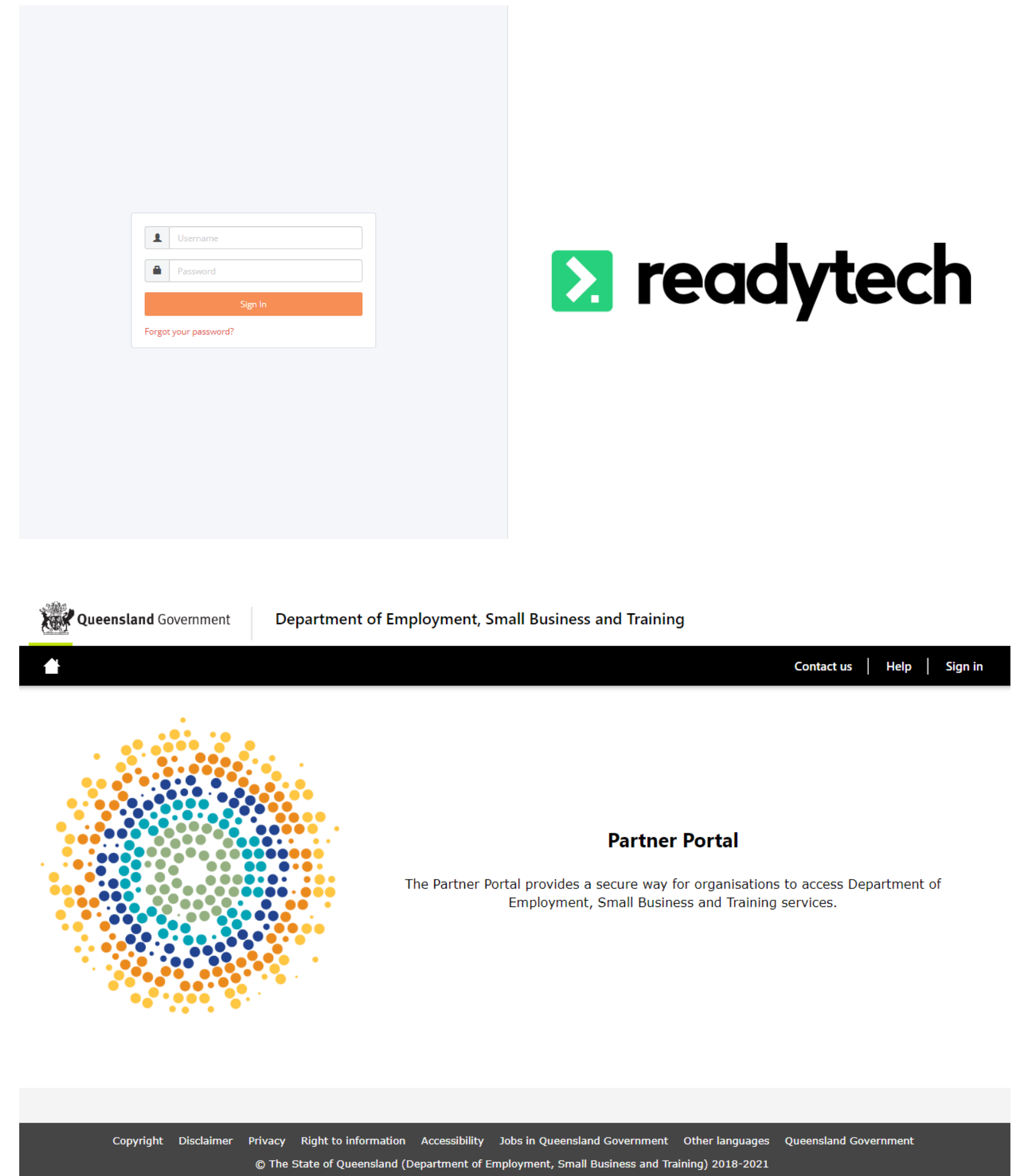
Reporting

How

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

Administration > Funding > Claims Reports
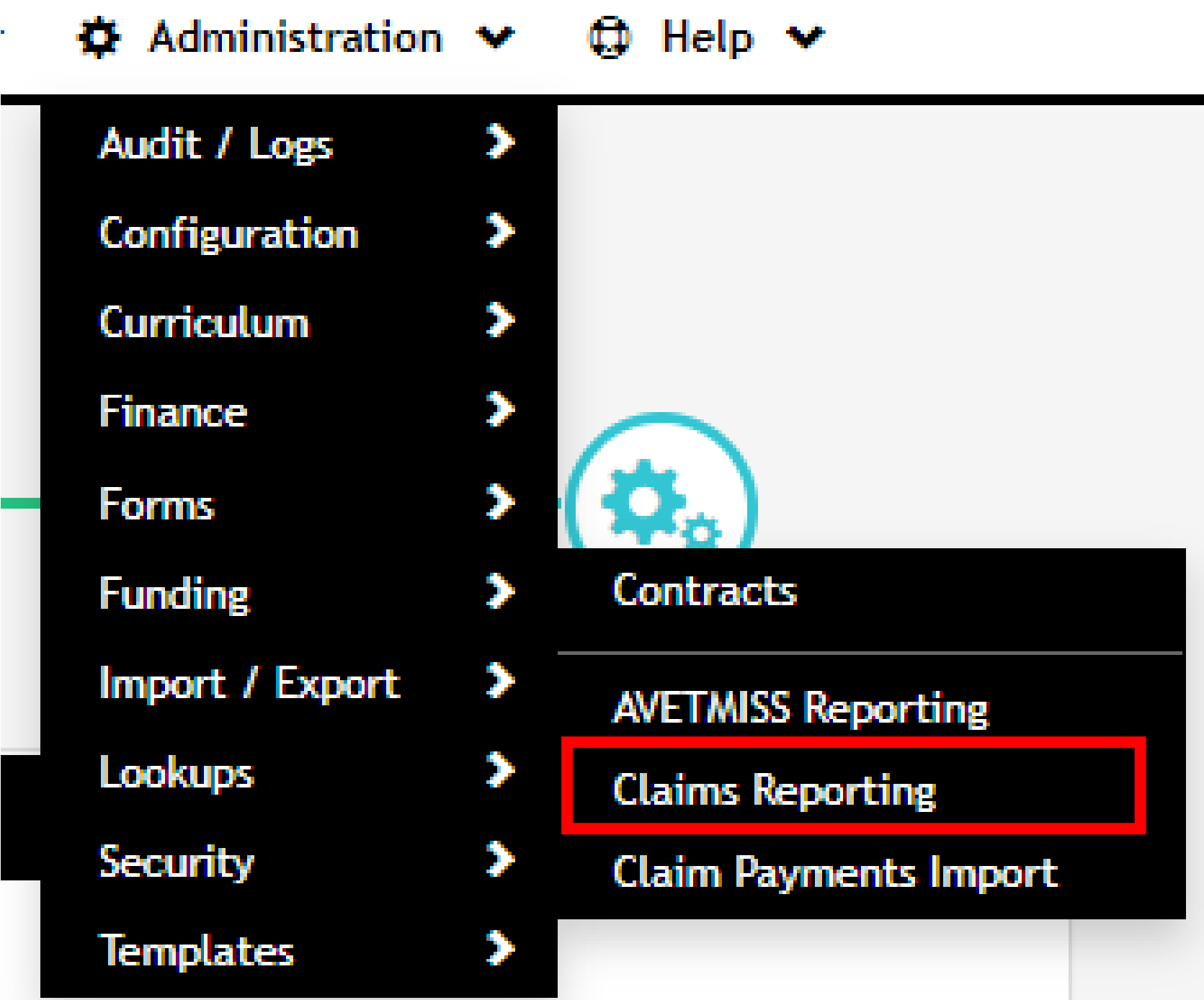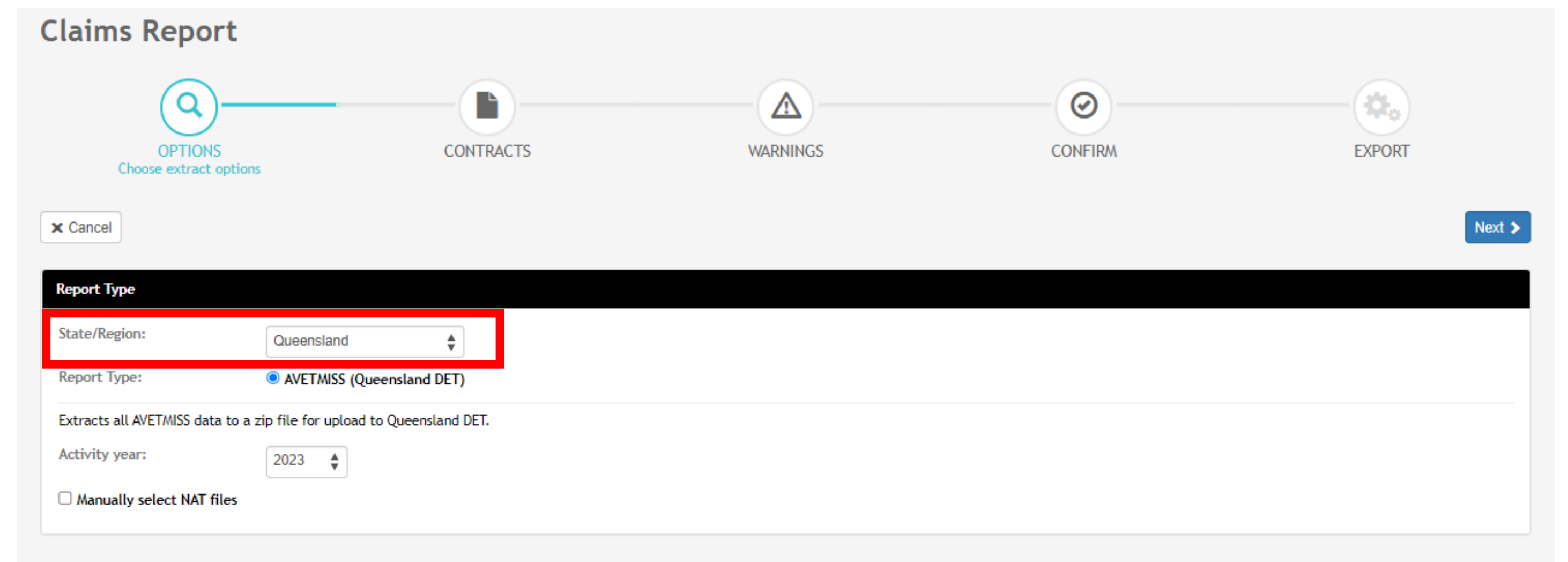
Claims Reports

Options

Administration > Funding >
Claims Reports

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

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 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 Reports

Confirm

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

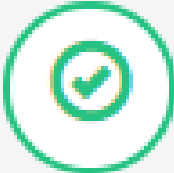The CSV of warnings can be downloaded for review

Claims 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
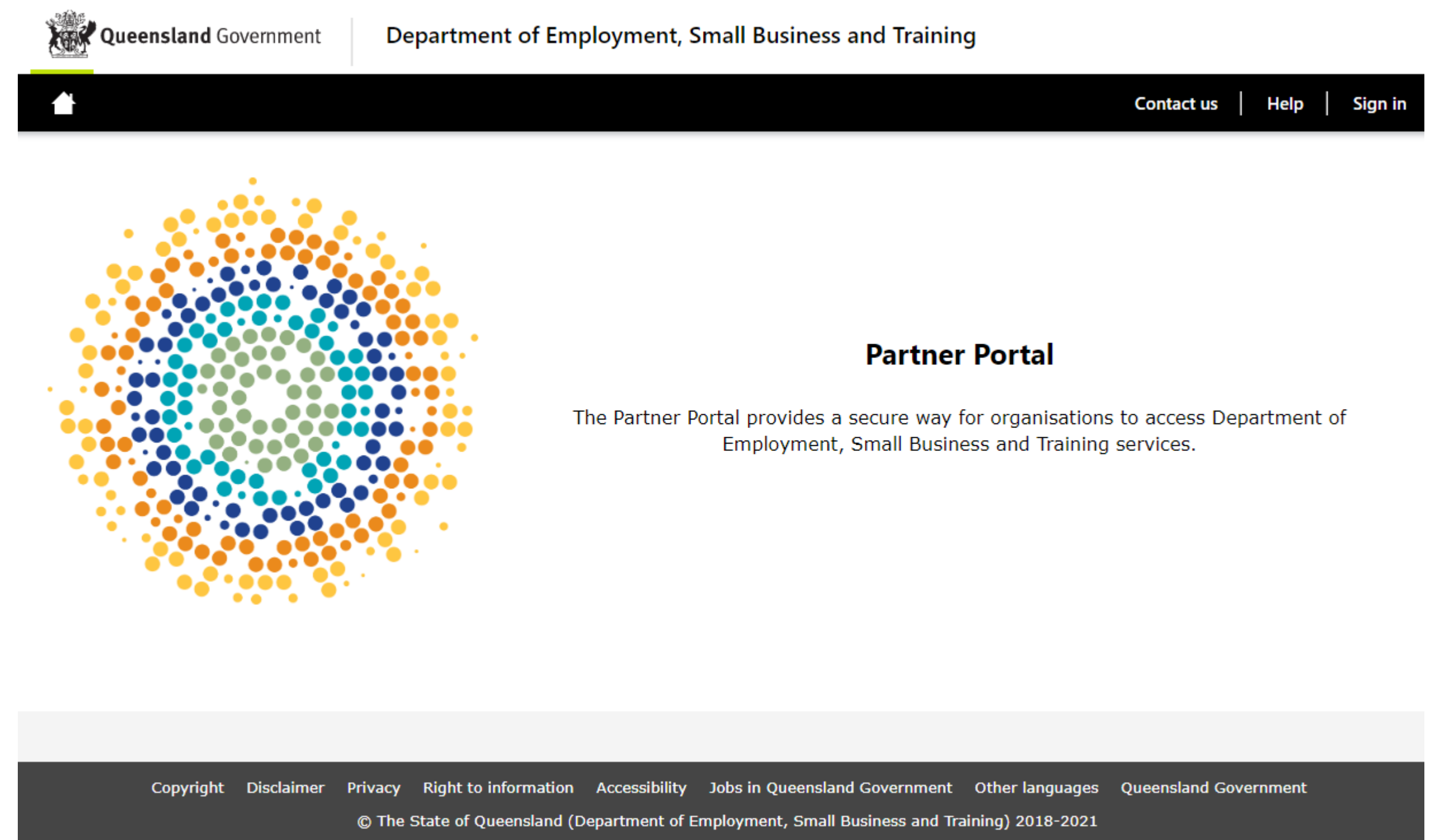
Claims Reports

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
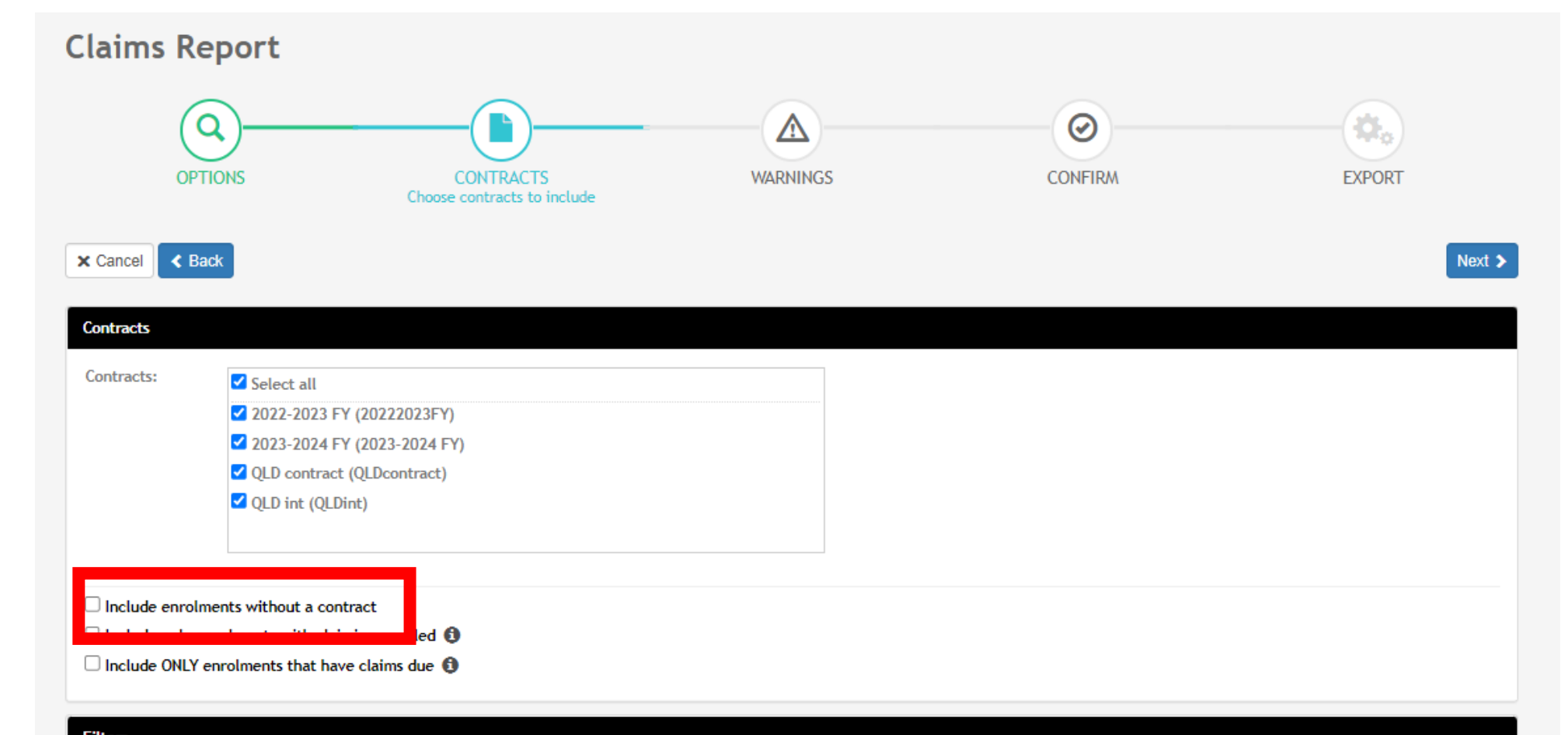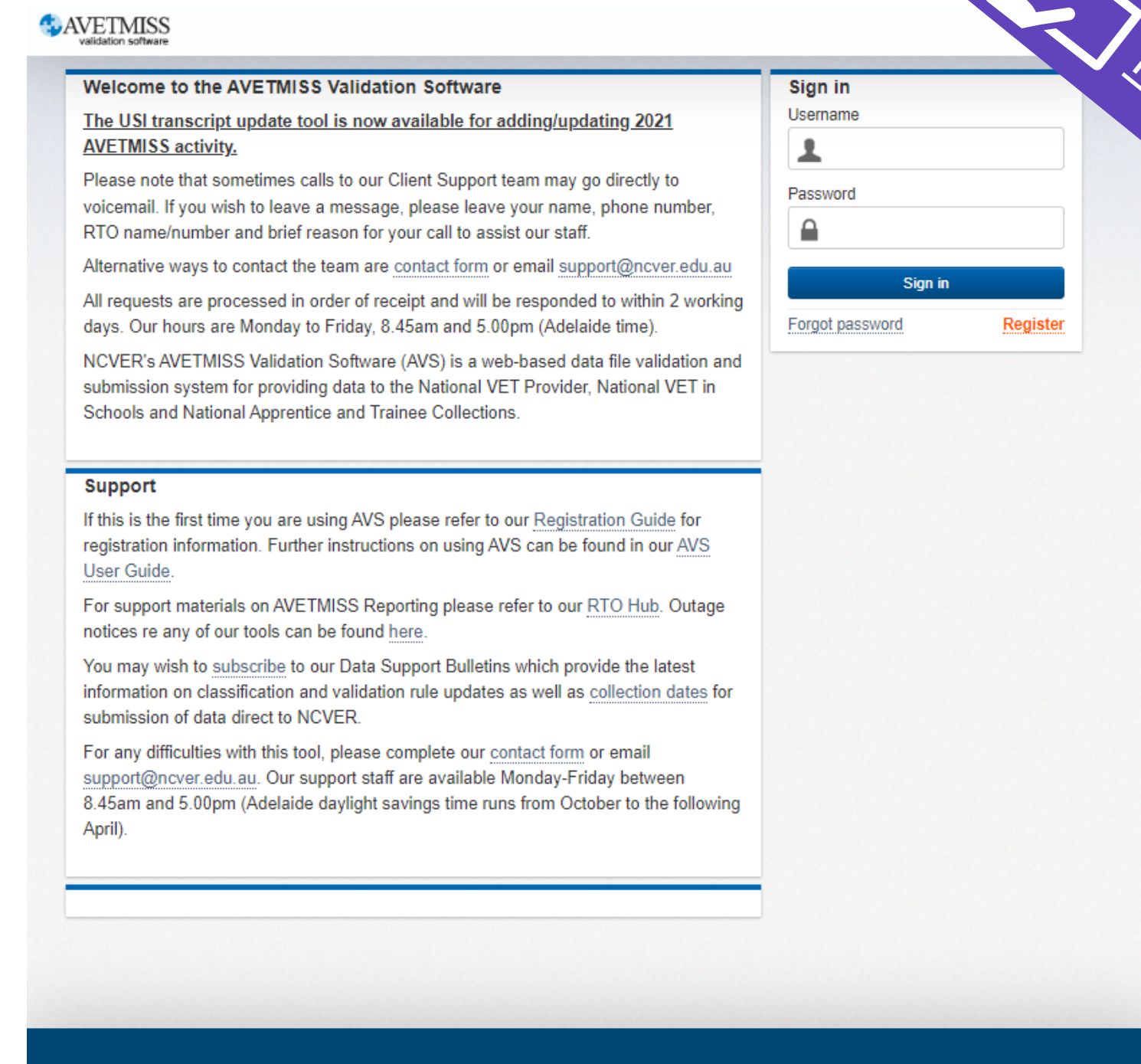
Claims Reports

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

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Claim Payment Import

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

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

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

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

*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

View

The status and amount received for the student's claim has been updated

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

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Funding Reports

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Funding Reports

Standard Reports

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

Reports > Standard Reports

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

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

Lets go do it!

Let's take a look at:

- Run Standard reports
    - Enrolment Claims overview
    - Contract overview

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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
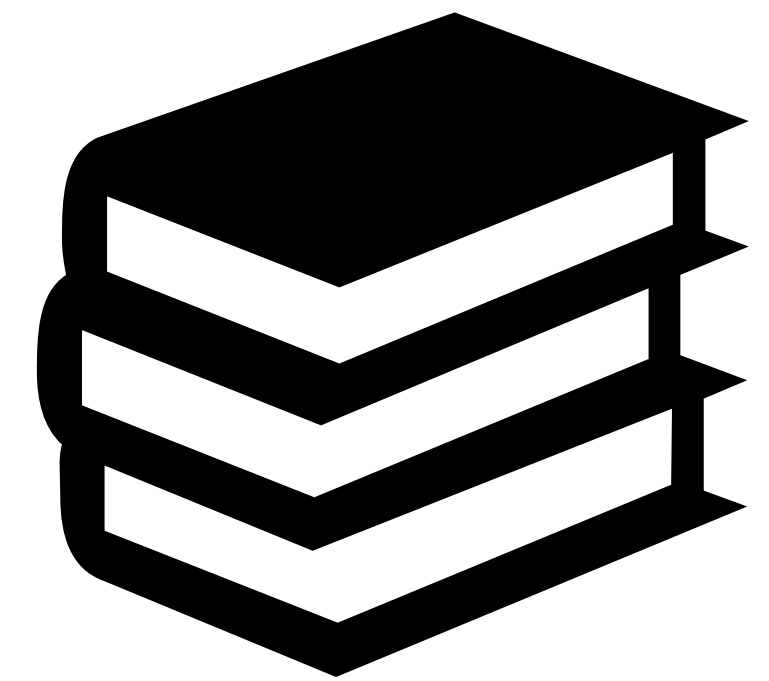
Enjoyed today's session?

Please navigate to article <u>here</u> 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

<u>Please navigate to article here</u>

To view more information about the full training series.
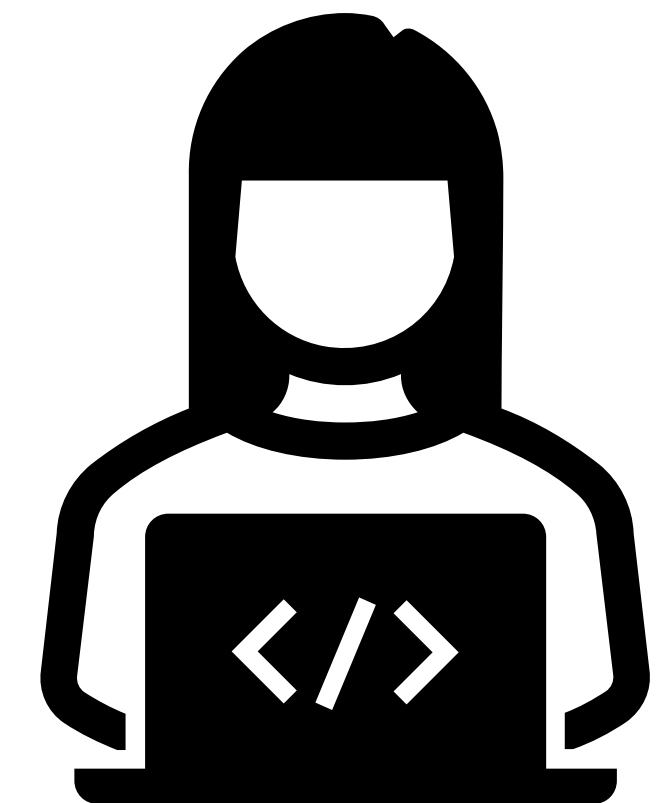
Thank you

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