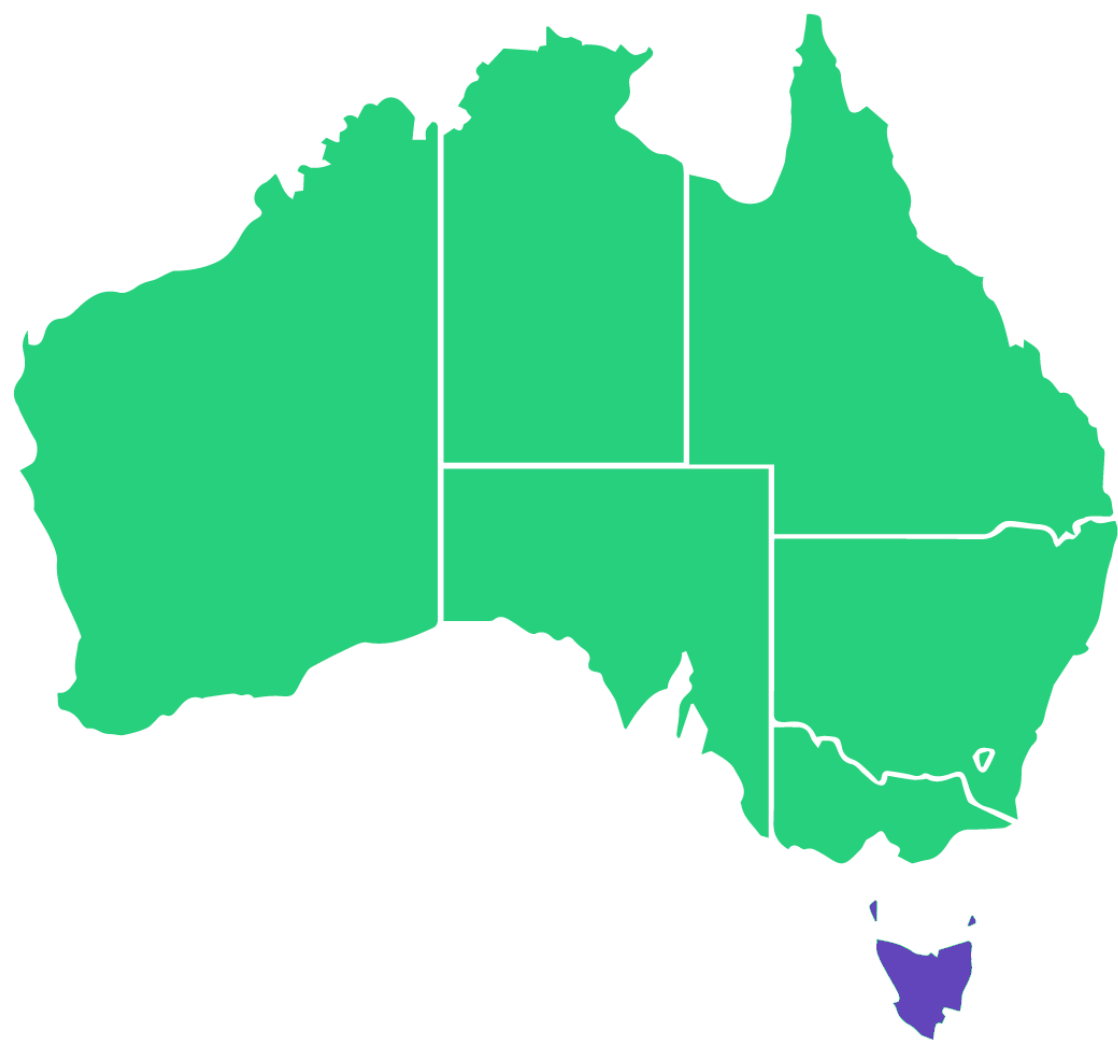


Tasmania



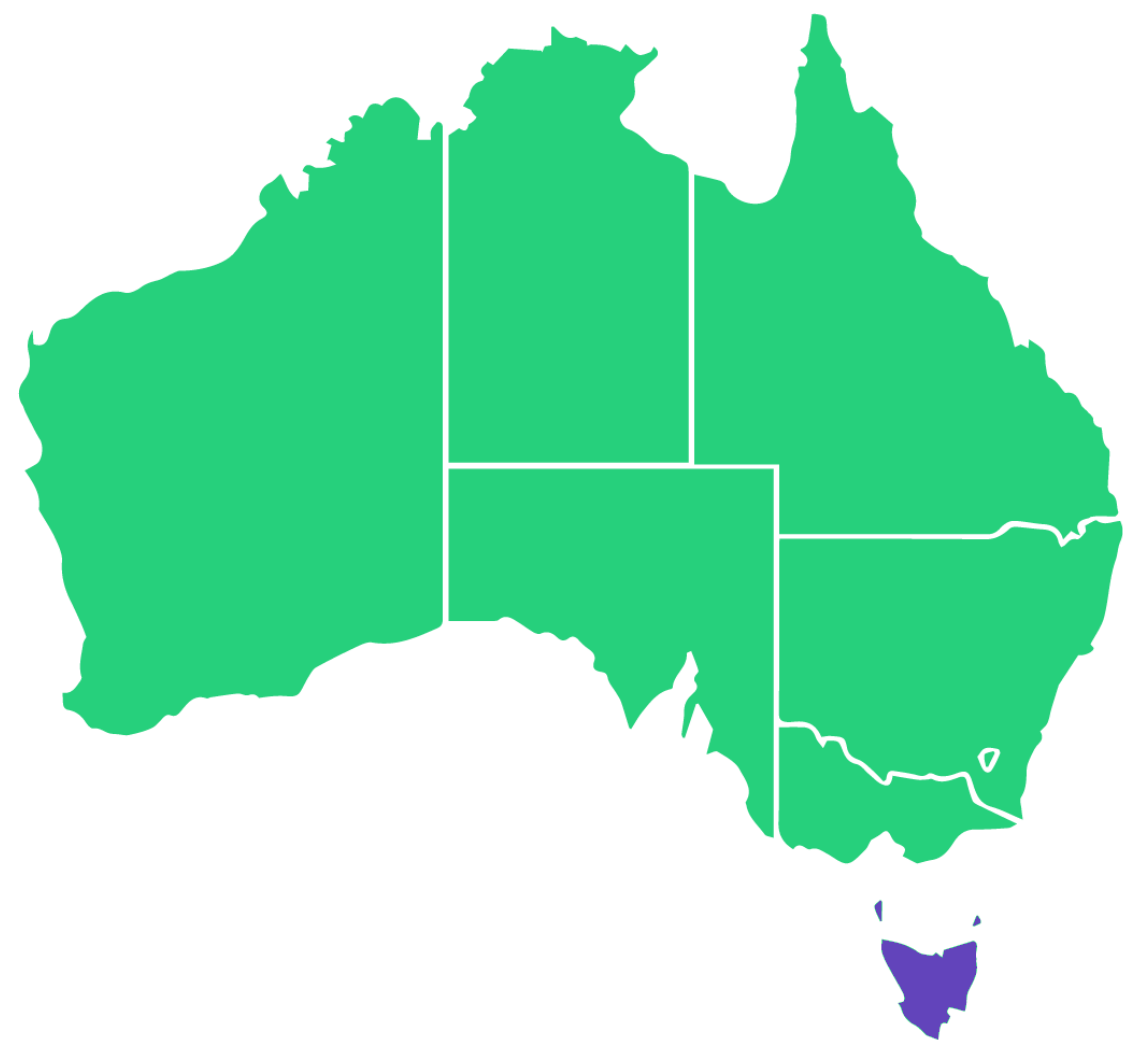
Agenda



Topics Covered

- | | |
|---|----------------------------|
| 1 | State Funding Source |
| 2 | Contracts |
| 3 | Finance |
| 4 | Enrolment |
| 5 | Traineeship/Apprenticeship |
| 6 | Training Plan |
| 7 | Reporting |
| 8 | Claims Payments |
| 9 | Funding Reports |

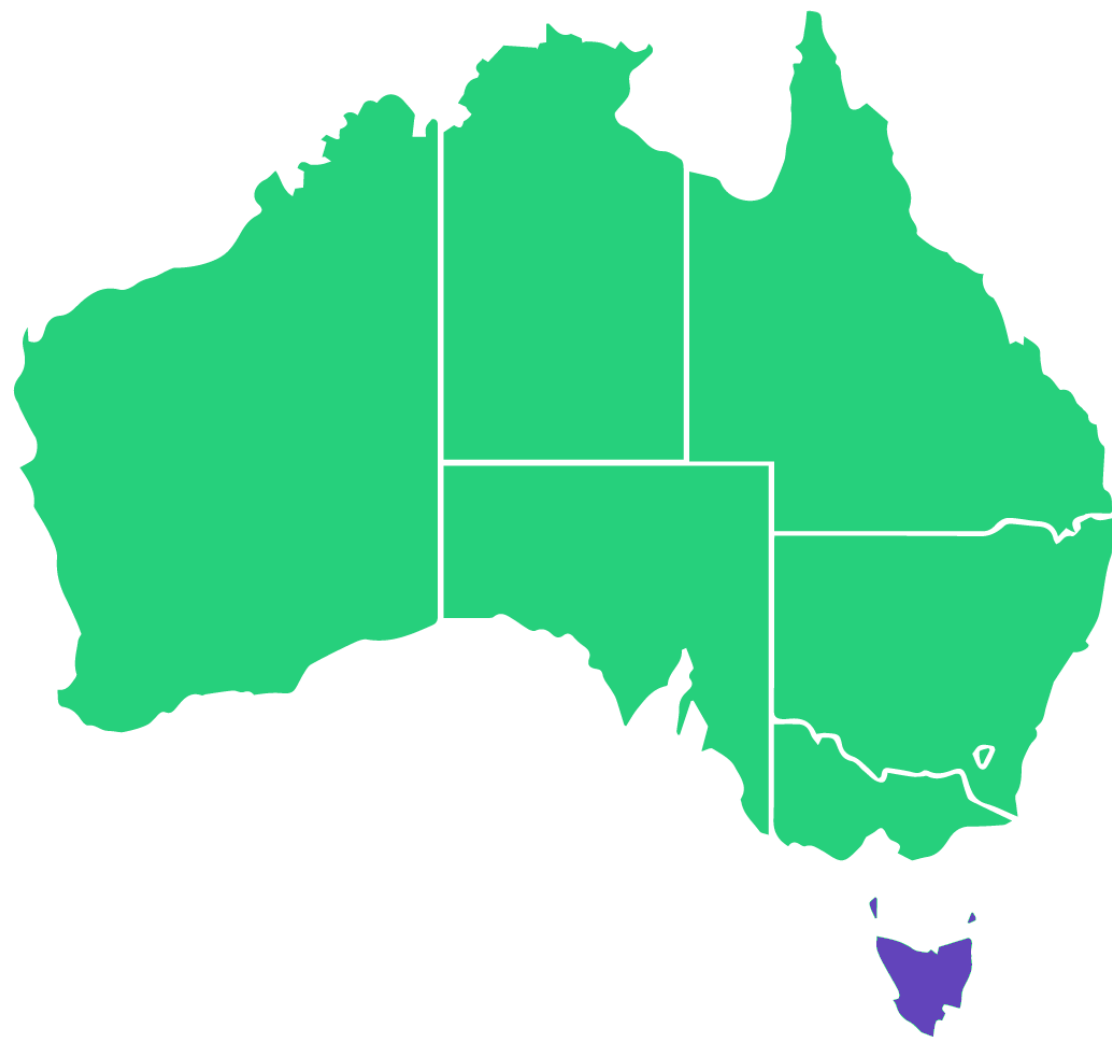
Agenda



Learning Objectives

- 1 To create locations 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 an claims report

TAS



State Training Authority (STA): Skills Tasmania

Reporting System: Email NAT files along with NCVVER Validation summary directly to Skills Tasmania

Website: <https://www.skills.tas.gov.au/home>

Reporting Documentation:

https://www.skills.tas.gov.au/providers/rto/how_do_i_report_my_activity



State Funding Source



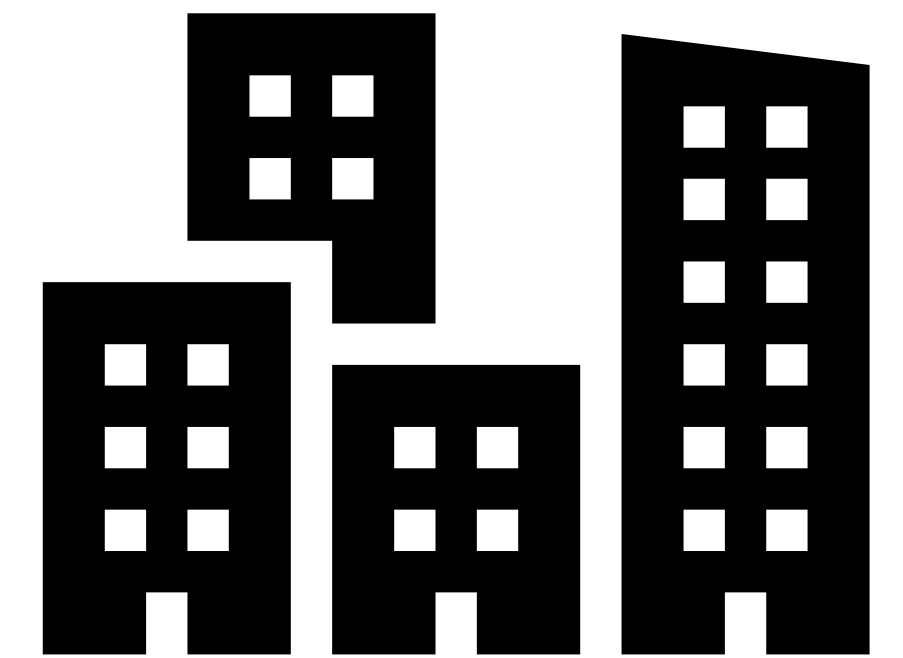
State Funding Source

A Funding Source is the method by which an enrolment fee is paid; either from a government funding pool or a client paid fee.

There are several funding sources that exist within the system. If you require any additional funding sources, these can be created at your convenience.

Tasmania has unique State Funding Source codes which map to National Funding Source codes, used to fund delivery of training activity in a unit of competency or module.

Reference: https://www.skills.tas.gov.au/providers/rto/how_do_i_report_my_activity/tasmania_specific_reporting_requirements



State Funding Source

Check/Adding

Check that your required state funding sources are available:

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 all Disable 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:

×11:Commonwealth and State general purpose recurrent×

savecancel

Lets go do it!

Let's take a look at:

- Adding a new funding source



 **readytech**



Contracts

 Review Session 2

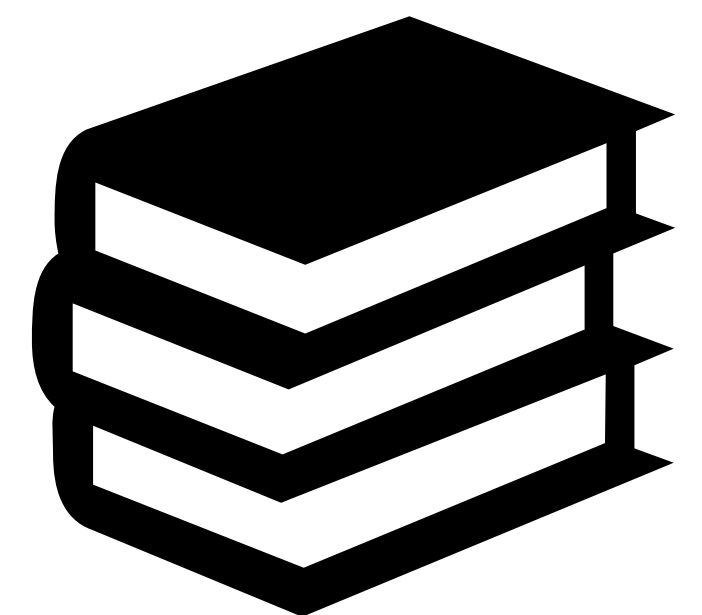
ReadyTech Education

Contracts

RTOs who wish to access Tasmanian Government funding to provide subsidised training to learners in Tasmania must be endorsed by Skills Tasmania.

Skills Tasmania will have an agreed amount that will be specified in the schedule of purchased programs that they will pay to the RTO.

Reference : https://www.skills.tas.gov.au/providers/rto/non_endorsed_rtos



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

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 41 Page

New Contracts

Save

Cancel

Contract Details

*Name:

Code:

*State/Region:

Tasmania

Funding Source:

*Program:

Tasmania - User Choice

Per Unit (\$):

250

Schedule:

Start Date:

End Date:

Reporting Period:

Acquitted:

☐

Enabled:

☒

Contracts

Attaching Contracts to Course

Contract attached to the Course on creation

Information is passed onto all enrolments

Course > Add New Course

Available contracts will show up once a state/region has been set within the Claims and Funding section

Select the funding source

Main

*Course number:

CSEREA00074

Name:

AVETMISS Code:

BSB50120

Program:

Diploma of Business

Course Status:

Tags:

Location:

Launceston

Cost Centre:

*State/Region:

Tasmania

*Start Date:

1/5/2023

*End Date:

31/5/2023

Enrolment Start:

Enrolment End:

*Max Enrolments:

0

*Min Enrolments:

0

Rating:

☆☆☆☆☆ 0

Brand:

\$ Claims & Funding

VET Student Loans:

☐

Priority:

Contract:

Start Typing...

Funding Source State:

Funding Source National:

Fee Exemption State:

Client Tuition Fee:

\$ 0.00

Resource Fee:

\$ 0.00

Lets go do it!

Let's take a look at:

- Setup funding Contract
- Create a Course with a Contract





Finance

Finance

Reporting for Skills Tasmania requires the inclusion of tuition and resource fees

Tuition Fee

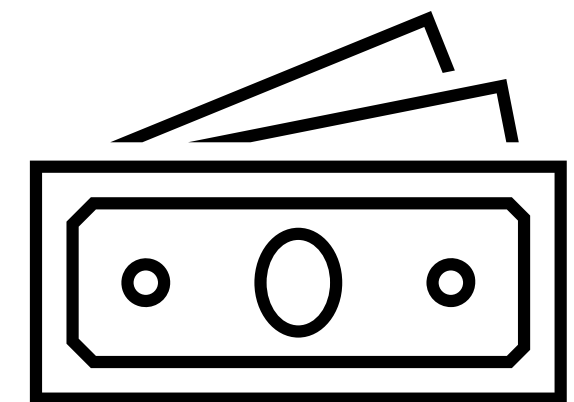
“Client tuition fee is the amount of tuition and/or administration fee charged to a client for a Subject or Program enrolment. “

Resource Fee

A field that captures fees/cost associated with resources utilised for the delivery of the training, such as materials, equipment, uniforms, etc. Resource fees are separate to the Client Tuition Fee and may be levied to a client for a Program and/or a Subject Enrolment. To facilitate a better understanding of fees charged to a client within the government-subsided training market.”

Reference:

https://www.skills.tas.gov.au/providers/rto/how_do_i_report_my_activity/tasmania_specific_reporting_requirements



Finance

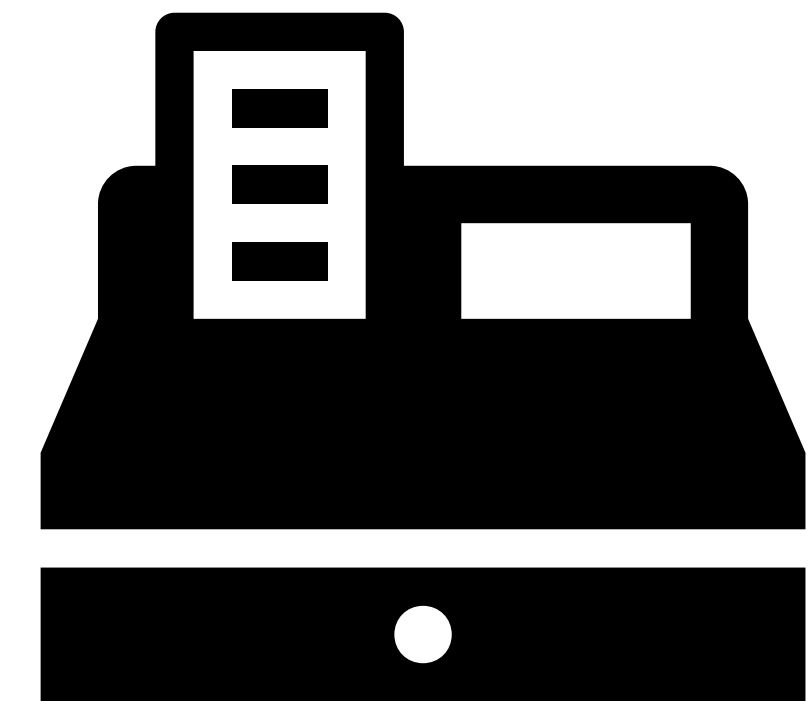
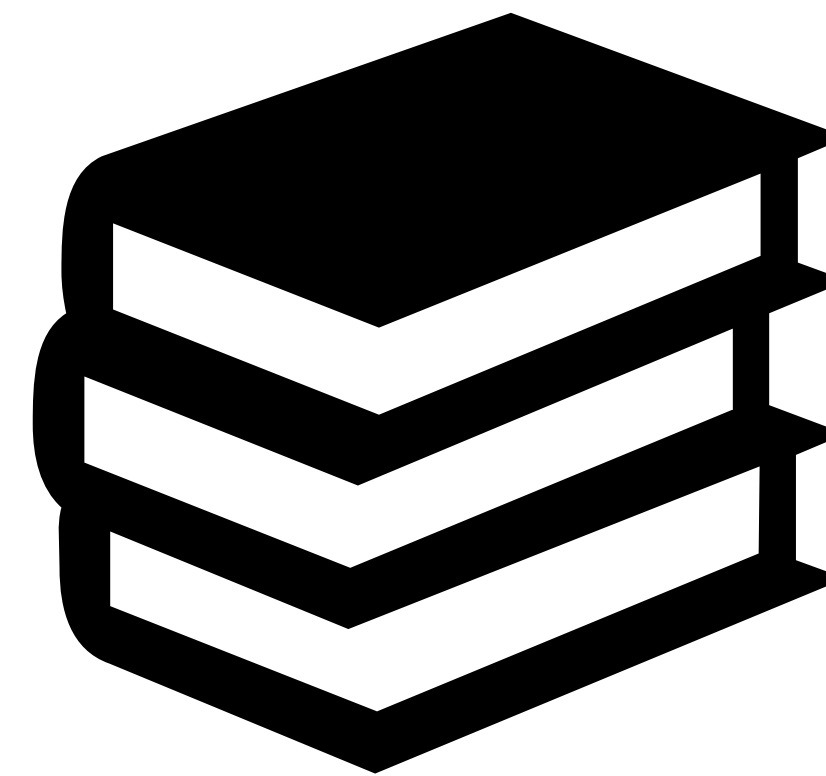
Options

There are a several options for the reporting of tuition and resource fees

1. Smart Fee
2. Course level
3. Enrolment level

NOTE!

You can do a combination of these e.g.
Smart fees for tuition fees and resource fee at enrolment level



Finance

1. 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

Tas Tuition Fee

Type

Tuition Fee

Category

Course

Description

Status

Approved

Pricing Period

Start Date

End Date

Settings

Agent Commission

Deferred Revenue

Discount (Code)

Enabled

Scholarships

\$ Amount

Ledger

Enrolment Fees (123456)

Amount

\$ 7707.77

Total

\$ 7707.77

Allow Amount Adjustment

Subledger

Tax

GST Free

Multiplier

None

Modifier Rules

readytech

ReadyTech Education

403

Finance

1. Smart Fee: Setting up a smart fee library

Administration > Finance > Smart Fee Library > +

When creating your Smart Fee Library to report Tuition Fee for each unit you need to select:

Type = Tuition Fee

Or

Type = Resource Fee

The remaining details are the same as normal setup

NOTE!

You can only select one type so you will need 2 smart fees setup if using it for both tuition and resource fees

New Smart Fees

Save Cancel

Details

Name

Status New

Pricing Period

Start Date

End Date

Type

Category

Description

Tuition Fee

Resource Fee

Course Fee

Settings

Agent Commission

Enabled

Smart Fees Library

New

Search

Enter Name

Filters Saved Filters

Search Save Clear

Import Export

Search Results

Bulk Actions

Name	Type	Category	Ledger	Subledger	Total (Incl. tax)	Description	Status
TAS - Resource Fee	Resource Fee	Course	Enrolment Fees (123456)		\$65.00		Approved
Tas Tuition Fee	Tuition Fee	Course	Enrolment Fees (123456)		\$7707.77		Approved

Finance

1. Smart Fee: Use during 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 TAS - CSEREA00074 (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

☒ Smart fee

\$7772.77

Line Items

Description	Amount	Multiplier	Tax	Tax Amount	Total	
Tas Tuition Fee	\$ 7707.77	None	GST Free	\$ 0.00	\$ 7707.77	<div><div></div><div></div></div>
TAS - Resource Fee	\$ 65.00	None	GST Free	\$ 0.00	\$ 65.00	<div><div></div><div></div></div>

New Line

Finance

2. Course Level

Course > Add New Course > Claims & Funding

When creating a course, you can setup a Tuition fee and/or Resource fee which can be then inherited by any enrolments that come through if not overwritten by:

- Enrolment level fees
- Smart fees

\$ Claims & Funding

VET Student Loans:☐

Priority:

Contract:

Start Typing...

Funding Source State:

Funding Source National:

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:

Tas (TAS2365)

Tasmania

Claims & Funding

Fee Exemption State:

Z: No Concession

Funding Source National:

11:Commonwealth and State general purpose recurrent

Delivery Mode:

Combination of internal and external

Survey Contact Status:

Available for survey use

Reporting Enabled:☒

Funding Source State:

60: User Choice Funding

Eligibility Exemption Indicator:

N

Employment Service Provider:

Priority:

Prospect:

State Specific Data

FSWA Category:

Delivery Mode Predominant:

Program Enrolment Identifier:

ENREA0038585850120

Program Status Identifier:

Program Commencement Date:

16/5/2023

Client Industry of Employment:

Client Occupation Identifier:

Upfront Tuition Fee:

\$1,500.00

Upfront Resource Fee:

\$55.00

Finance

3. Enrolment Level

When no enrolment level Smart fee for a tuition or resource Fee type has been applied, a single upfront tuition/resource fee can be applied

This will overwrite any course level fees setup
Enrolments > Enrol Students

Course Details

Trainee/Apprentice

Claims/Funding

Finance

Higher Ed

Custom Details

Contract: Tas (TAS2365) x ▾

Tasmania

Claims & Funding

Fee Exemption State: Z: No Concession ▾ ⓘ

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

Delivery Mode: Combination of internal and e ▾

Survey Contact Status: Available for survey use x ▾

Reporting Enabled: ☒ ⓘ

Funding Source State: 60: User Choice Funding ▾

Eligibility Exemption Indicator: ☐

Referral: ▾

Employment Service Provider: ▾

Priority: ▾

Client Industry of Employment: ▾

Client Occupation Identifier: ▾

Upfront Tuition Fee: ▾ ⓘ

Upfront Resource Fee: ▾ ⓘ

State Specific Data

FSWA Category: ▾

Delivery Mode Predominant: ▾

Program Enrolment Identifier: ▾

Program Status Identifier: ▾

Lets go do it!

Let's take a look at:

- Adding a Smart Fee library
- Adding an enrolment level fee





Enrolment

ReadyTech Education

Enrolment

Claims & Funding

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 TAS - CSEREA00074 (BSB50120) from 1/5/2023 to 31/5/2023

ENROLMENT
Set specific details into this enrolment

Course: CSEREA00074 / TAS
Program: BSB50120 / Diploma of Business
***Enrolment Status:** Active
GPA: 0

***Start Date:** 1/5/2023
***Target End Date:** 31/5/2023
End Date:
Brand:

Contract: Tas (TAS2365)

Tasmania

Claims & Funding

Fee Exemption State: Z: No Concession
***Funding Source National:** 11: Commonwealth and State general purpose recurrent

Reporting Enabled: ☒
Funding Source State: 60: User Choice Funding

Enrolment

Claims & Funding

Skills Tasmania has specific requirements during enrolment

Enrolments > Enrol Students

Contract: Tas (TAS2365) x

Tasmania

Claims & Funding

Fee Exemption State: Z: No Concession ⓘ

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

Delivery Mode: Combination of internal and e

Survey Contact Status: Available for survey use x

Reporting Enabled: ☒ ⓘ

Funding Source State: 60: User Choice Funding

Eligibility Exemption Indicator: ☐

Referral:

Employment Service Provider:

Priority:

State Specific Data

FSWA Category:

Delivery Mode Predominant:

Program Enrolment Identifier:

Program Status Identifier:

Program Commencement Date: [edit] ⓘ

Client Industry of Employment:

Client Occupation Identifier:

Upfront Tuition Fee: ⓘ

Upfront Resource Fee: ⓘ

- **Program Enrolment Identifier:** Unique enrolment identifier that ties reported units to an enrolment (system generated code)
- **Program Status Identifier:** Determines program completion rates and manages purchasing contracts and funding commitments. Update manually as enrolment status changes
- **Program Commencement Date:** The date the student commenced training activity in a particular program (system generated based upon the first date a program is updated)

Enrolment

Claims & Funding

Contract: Tas (TAS2365) x

Tasmania

Claims & Funding

Fee Exemption State: Z: No Concession ⓘ

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

Delivery Mode: Combination of internal and e

Survey Contact Status: Available for survey use x

Reporting Enabled: ☒ ⓘ

Funding Source State: 60: User Choice Funding

Eligibility Exemption Indicator: ☐

Referral:

Employment Service Provider:

Priority:

State Specific Data

FSWA Category:

Delivery Mode Predominant:

Program Enrolment Identifier:

Program Status Identifier:

Program Commencement Date: [edit] ⓘ

Client Industry of Employment:

Client Occupation Identifier:

Upfront Tuition Fee: ⓘ

Upfront Resource Fee: ⓘ

- **Client Industry of Employment:** Students employed and undertaking VET training activity need to be reported with the Industry Code of their employer or recent employer
- **Client Occupation Identifier:** When a student indicates employment, they must nominate an occupation code for the Client Occupation Identifier

Lets go do it!

Let's take a look at:

- Creating a student enrolment



 readytech



Traineeship/ Apprenticeship

ReadyTech Education

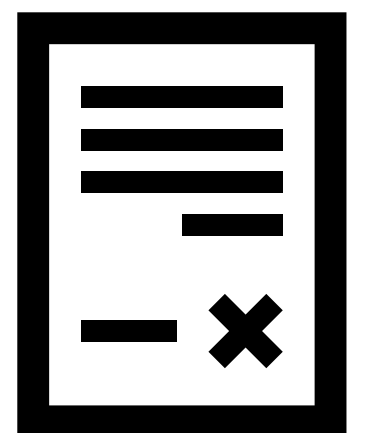


Traineeship/Apprenticeship

Some training information in the SMS requires additional details be entered to communicate the presence of a 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).

Learn more here: https://www.skills.tas.gov.au/apprenticeships_and_traineeships



Traineeship/Apprenticeship

Add Client Identifier = Trainee ID

Enter the Client identifier, which is the **Trainee ID**
Enrolments > Enrol Students

New Enrolment
Spencer Smith (PAREA00045) in TAS - CSEREA00074 (BSB50120) from 1/5/2023 to 31/5/2023

STUDENT PROFILE
Capture additional student details

Background

Labour Force Status:

Client Identifier: ⓘ

Country of Birth:

Town/City of Birth:

Nationality:

Indigenous Status:

Main Language:

Citizenship Details

Citizenship Status:

Citizenship Effective From Date: ⓘ

School Details

At School: ☐ Not Stated ☐ Yes ☐ No

Disability

Disability: ☐ Not Stated ☐ Yes ☐ No

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 TAS - CSERE00074 (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 ☒ [i](#)

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

Supervisor [Select](#)

Period of enrolment ☐ whole enrolment

From [Select](#)

Proposed End Date [Select](#)

End Date [Select](#)

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](#)

Traineeship/Apprenticeship

Enrolment – Add Trainee/Apprentice

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

New Enrolment
Spencer Smith (PAREA00045) in TAS - CSERE00074 (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: CSERE00074 / TAS *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.

Cancel Back Next Confirm Now

Traineeship/Apprenticeship

Enrolment – Enter Trainee/Apprentice

- **TCID (Training Contract Identifier):** Regn No.
- **Type:** Where you note who 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 from Training Plan Signed to Contract start and end date

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:

Key Dates

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

Training Contract

Training Plan Signed:

Initial Skills Assessment:

Training Provider:

Contract Start Date:

Contract End Date:

Contract Status Date:

Contract Status:

Contract State:

Finance

Annual Leave Balance:

Personal Leave Balance:

Pay Rate:

Traineeship/Apprenticeship

Enrolment – Complete Enrolment

Finish entering all enrolment details and Create
Steps must now be taken in the party record

Enrolment DetailsENREA00400 / Spencer Smith (PAREA00045)

Student: Spencer Smith (PAREA00045)

Course: CSEREA00074 / TAS

Program: BSB50120 / Diploma of Business

Enrolment Status: Active

GPA: 0

Enrolment ID: ENREA00400

Start Date: 1/5/2023

Target End Date: 31/5/2023

End Date:

Brand:

Summary

Units

0%

Total Units: 12

Total Units Completed: 0

Attendance

0.00%

Scheduled Hours: 0.0

Attended Hours: 0.0

Invoiced

0.0%

Total Projected: \$0.00

Total Invoiced: \$0.00

Claims

0%

Total Claims: 24

Total Invoiced: 0

Course Details

Trainee/Apprentice

Claims/Funding

Finance

Higher Ed

Custom Details

More

Course Details

Worker Type: New Worker

Academic: Bridgette Trainer (PAVET00006)

Other Academic:

Coordinator: Launceston

Location:

Study Period:

Total Number of Weeks:

Paid Number of Weeks:

Tier:

Region:

Arrival Date:

Study Mode: Full Time

Qualification Level: Diploma/421

VETIS:

Course Type:

Study Reason: Not Specified

COE ID:

COE Status:

COE Issue Date:

Specialisation:

Application Details

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 available for selection. This was done during the enrolment wizard. If you did not, see next slide.

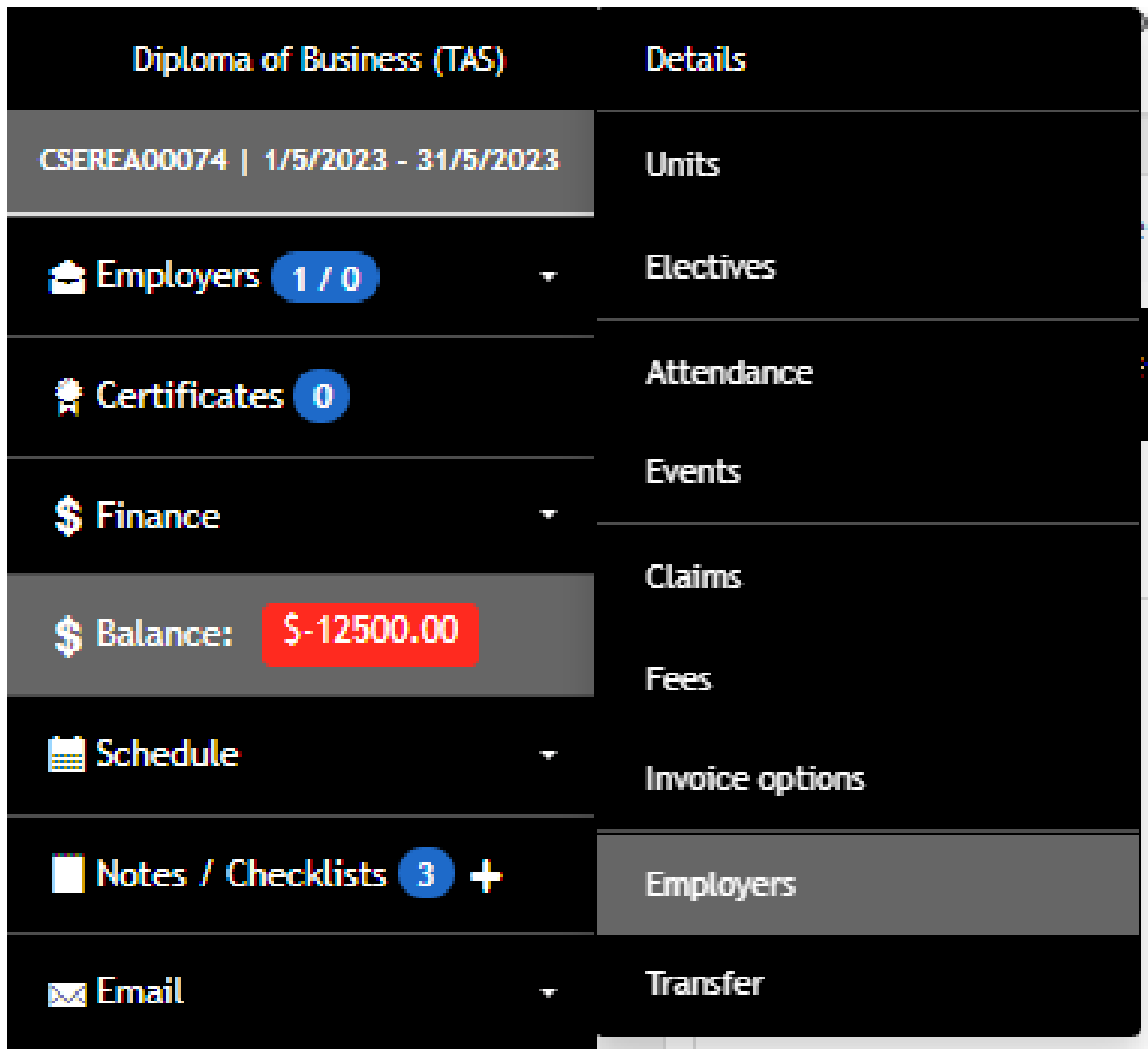
The screenshot shows the 'Enrolment Edit' interface for a student named Spencer Smith (PAREA00045). The form is divided into several sections: Course Details, Trainee/Apprentice, Claims/Funding, Finance, Higher Ed, and Custom Details. The 'Trainee/Apprentice' section is currently active. Within this section, the 'Details' tab is selected, and the 'Employer' field is highlighted with a red box. The 'Employer' field is a dropdown menu with the text 'Start Typing...'. Other fields in the 'Details' section include TCID, Type, AASN, Mode, Active (checked), End Reason, Training Plan Signed, Initial Skills Assessment, and Training Provider. The 'Training Contract' section includes fields for Contract Start Date, Contract End Date, Contract Status Date, Contract Status, and Contract State. The 'Key Dates' section includes a field for 'How long is the Traineeship/Apprenticeship?' with a range of 1 to 4. The 'Finance' section includes fields for Annual Leave Balance, Personal Leave Balance, and 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 ENREA00400 | Spencer Smith (PAREA00045)

Save Cancel

Student: Spencer Smith (PAREA00045)
Course: CSEREA00074 / TAS
Program: BSB50120 / Diploma of Business
Enrolment Status: Active
GPA: 0

Enrolment ID: ENREA00400
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 ☒ *i*

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:

Save Cancel

Lets go do it!

Let's take a look at:

- Add a Trainee/Apprenticeship to a student's enrolment



 readytech



Training Plan

 Review Session 9.1



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

Preview

Title

Training Plan National v2018

APPRENTICESHIP / TRAINEESHIP TRAINING PLAN

Further Education and Training Act 2014

Section 1 – Contact Details and Training Contract Information		WHAT IS A TRAINING PLAN?
Training Contract	<div>QUALIFICATION NAME</div> <div><small>{course.course_scope.name}</small></div>	<div> <div>• The Training Plan describes what training is to be undertaken and outlines who provides the training</div> <div>• The Training Plan outlines how, when and where training will be delivered</div> <div>• The Training Plan outlines how the assessments will occur and when the apprentice/trainee is deemed competent</div> <div>• The Training Plan is developed and maintained by the RTO in conjunction with the apprentice/trainee and employer</div> <div>• The Training Plan is a working document to be used for the duration of the Training Contract and regularly updated</div> <div>• The Training Plan, developed in conjunction with the apprentice/trainee and employer, is a living document that is intended to reflect the current status of the apprentice's or trainee's training</div> <div>• The employer and apprentice/trainee are to be provided with an updated copy of the Training Plan by the RTO</div> <div>• The delivering RTO must comply with relevant national standards and relevant state training authority legislation, policies and procedures</div> <div>• The RTO is to ensure the employer and apprentice/trainee understand the workplace tasks that need to be undertaken to support the development and achievement of competency in the workplace for each unit within the Training Plan</div> </div>
APPRENTICE / TRAINEE	<div>FULL NAME</div> <div><small>{party.other_name} {party.middle_name} {party.name}</small></div>	
Employer	<div>REGISTRATION NUMBER</div> <div><small>{student.tcid}</small></div>	
Is the apprentice/ trainee hosted?	<div> <div>LEGAL NAME:</div> <div><small>#(if party_employer) {party.employer.name} #end</small></div> </div> <div> <div>TRADING NAME:</div> <div><small>{party_employer.other_name} #end</small></div> </div> <div> <div>Yes </div> <div>No </div> </div>	
Registered Training	<div> <div>RTO NATIONAL CODE:</div> <div><small>#(if role_rto){role_rto.rto_identifier}#end</small></div> </div> <div> <div>RTO TRADING NAME:</div> <div><small>TELEPHONE:</small></div> </div>	

Templates

Fields

Student: Training Plans

Training Plan ACT - Skill Capital

Training Plan National v2018

Training Plan NSW v2018

Training Plan QLD v2018

Training Plan SA

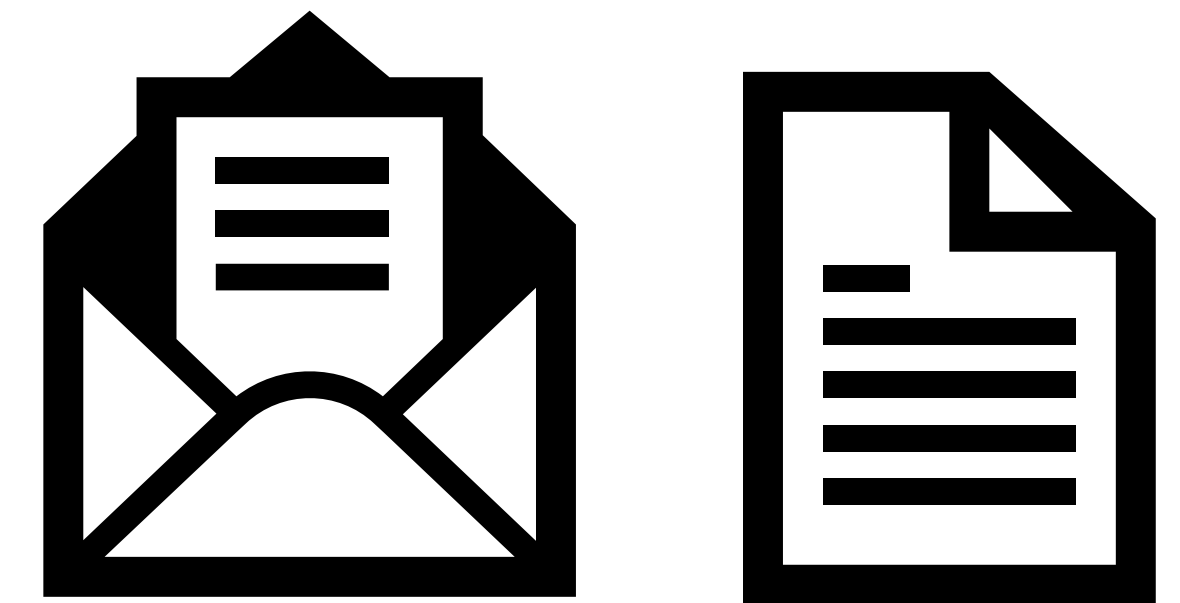
Training Plan VIC v2018

Training Plan WA

Training Plan

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



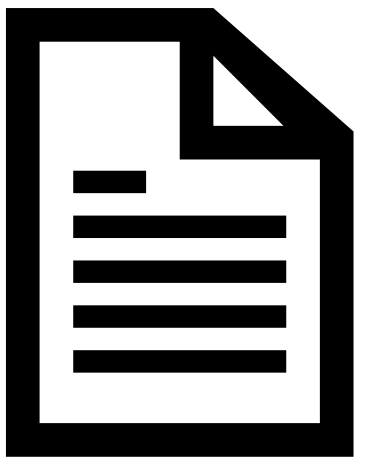


Reporting



ReadyTech Education

Reporting



“Endorsed Registered Training Organisations with a funding agreement with Skills Tasmania are required to report training activity data to **Skills Tasmania** on a **quarterly basis**.”

The data must be Australian Vocational Education and Training Management Information Statistical Standard (**AVETMISS**) Compliant”

“To fulfil reporting requirements, export your data from your Student Management System in the form of 10 NAT files. The NAT files must then be uploaded to the NCVER AVETMISS Validation Software (AVS) in order to gain an error free Collection Processing Summary Report. Once achieved, send the error free NAT files along with the summary report to avetmiss@skills.tas.gov.au. When submitting files via email, please include the RTO name and RTO National ID in the subject line of the email.

Data can be submitted at a **maximum frequency** of once a month. Payments to RTOs are generated based on activity reported.”

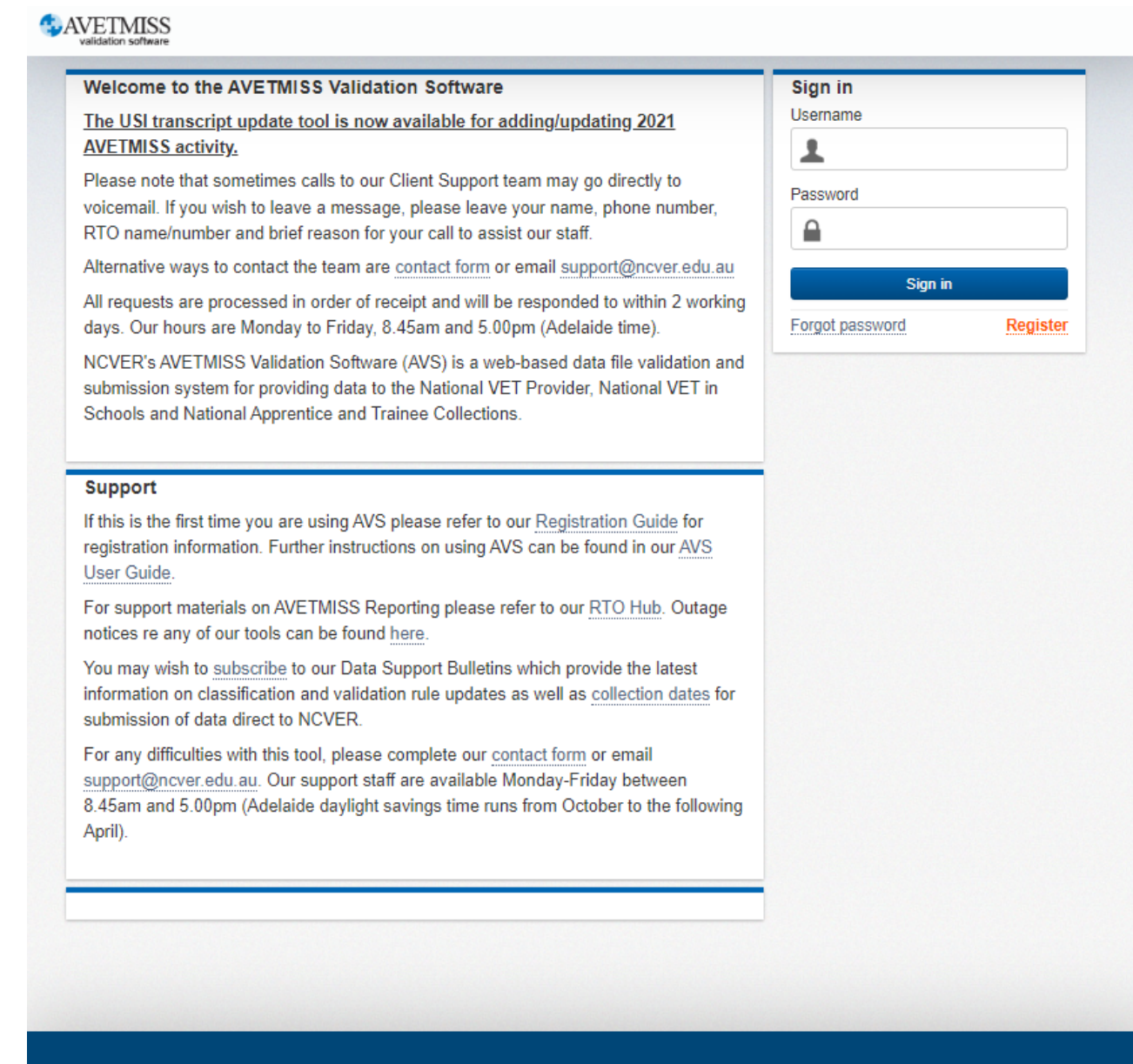
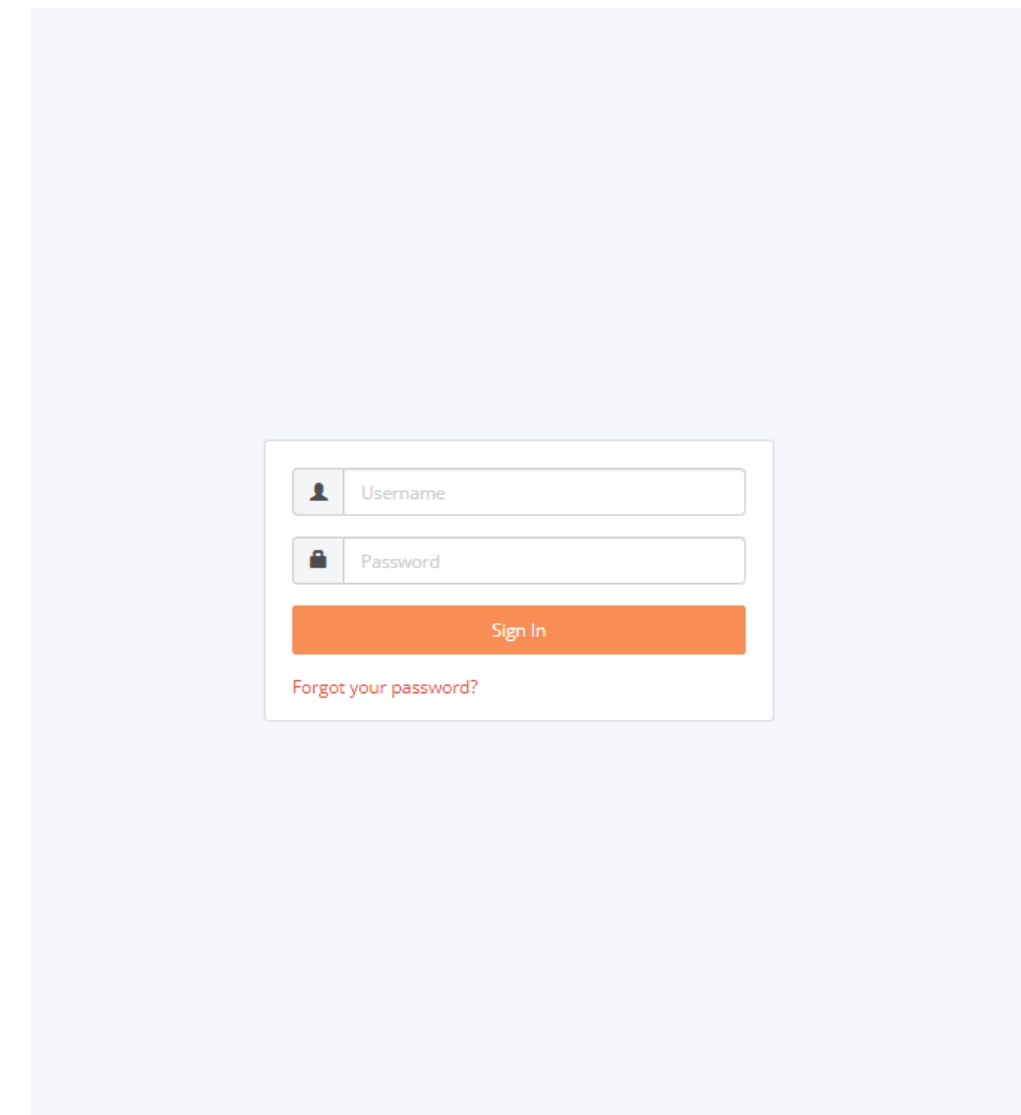
Reference: https://skills.tas.gov.au/providers/rto/how_do_i_report_my_activity

Reporting

How

To AVETMISS upload to Skills Tasmania you will need:

1. A student management system (SMS) which is capable of producing AVETMISS files
**that's us!*
2. Access to AVS (NCVER AVETMISS Validation Software) to validate files
3. The ability to email documents to Skills Tasmania

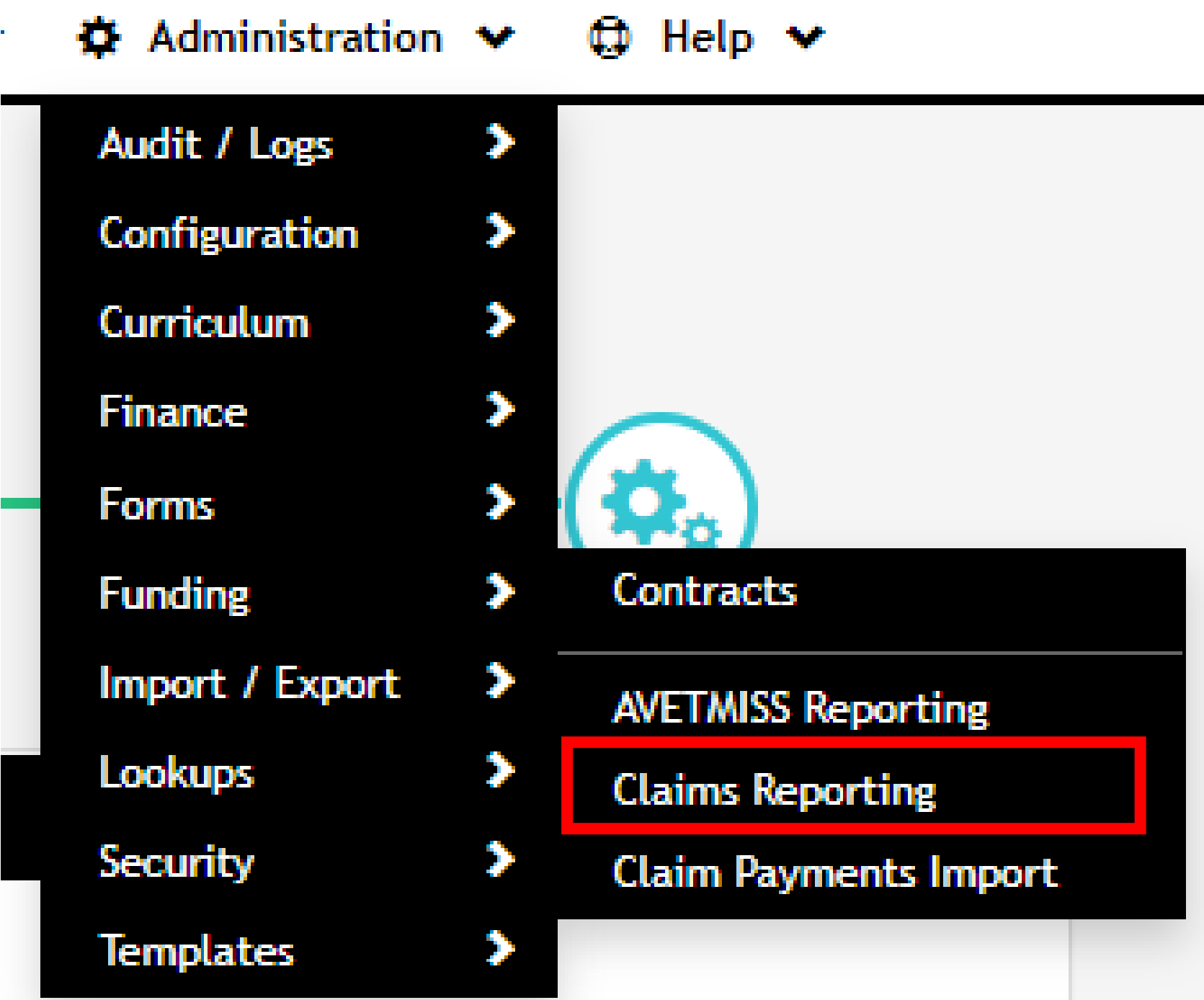


Reporting

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

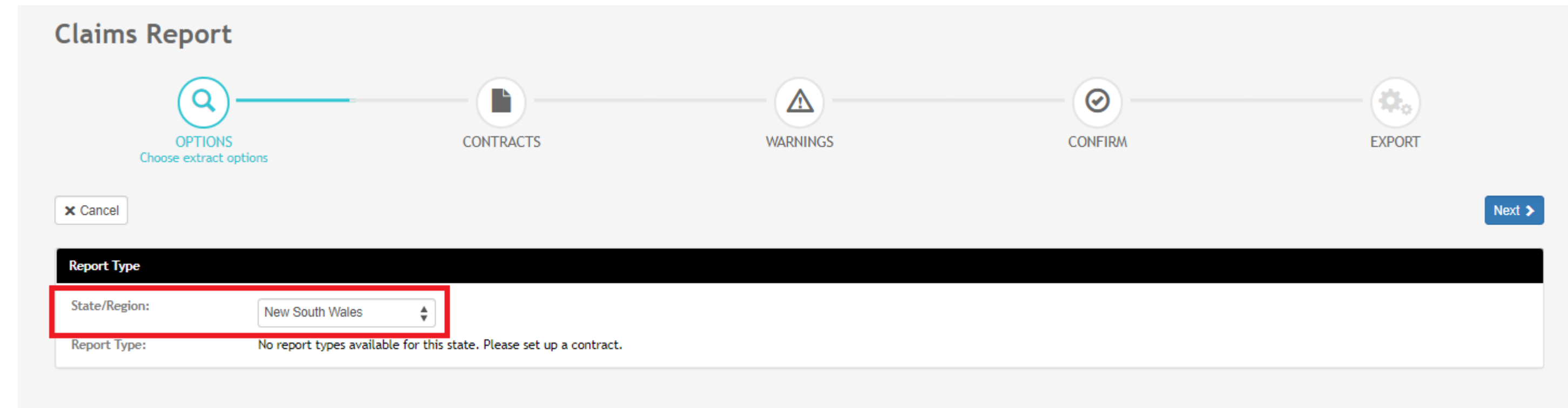
Report ID	State	Report Type	Date	Claims	Open Claims
No claim-batches found					

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 the 'OPTIONS' step selected. The 'State/Region' dropdown is set to 'New South Wales'. Below it, a message states: 'No report types available for this state. Please set up a contract.' The 'Report Type' field is empty.

Claims Report

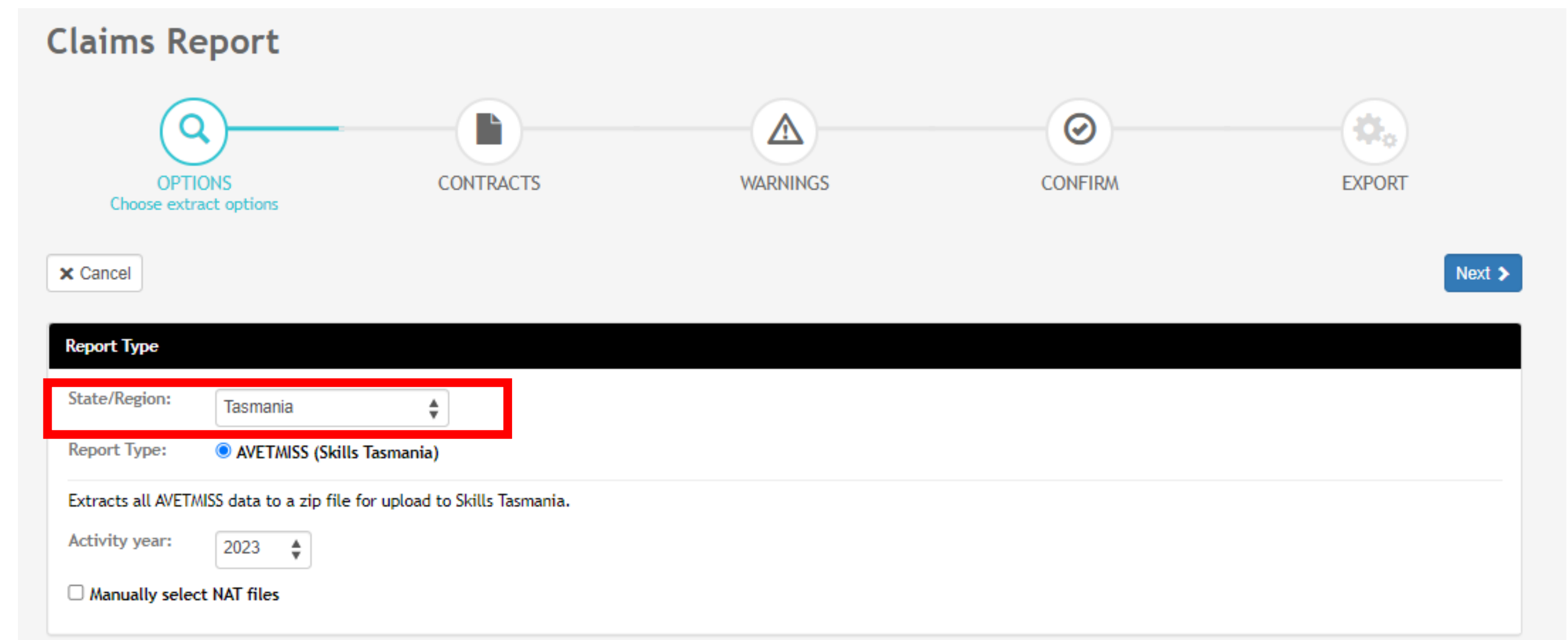
OPTIONS (Choose extract options) | CONTRACTS | WARNINGS | CONFIRM | EXPORT

Cancel | Next >

Report Type

State/Region: New South Wales

Report Type: No report types available for this state. Please set up a contract.



The screenshot shows the 'Claims Report' interface with the 'OPTIONS' step selected. The 'State/Region' dropdown is set to 'Tasmania'. Below it, the 'Report Type' is set to 'AVETMISS (Skills Tasmania)'. The 'Activity year' is set to '2023'. There is a checkbox for 'Manually select NAT files' which is currently unchecked. A description states: 'Extracts all AVETMISS data to a zip file for upload to Skills Tasmania.'

Claims Report

OPTIONS (Choose extract options) | CONTRACTS | WARNINGS | CONFIRM | EXPORT

Cancel | Next >

Report Type

State/Region: Tasmania

Report Type: AVETMISS (Skills Tasmania)

Extracts all AVETMISS data to a zip file for upload to Skills Tasmania.

Activity year: 2023

☐ Manually select NAT files


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

☒ 202302 (202302)

☒ Tas (TAS2365)

☐ 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.

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

Check for warnings

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 57 warnings. (57 in total)

Download all warnings as CSV

Check Again

Student (57)

ENREA00311 - Rogger, Rubben (PAREA00019) - Diploma of Business (CSEREA00051) [BS850120]

AVETMISS - The Unique Student Identifier has not been recorded

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

ENREA00316 - Summer, Emma (PAREA00039) - Diploma of Business (CSEREA00051) [BS850120]

AVETMISS - You need to enter at least one full address

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

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433

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:

Tasmania

Report Type:

AVETMISS (Skills Tasmania)

Avetmiss Version:

8.0

Activity Year:

2023

Contracts:

• 202302 (202302)

• Tas (TAS2365)

Warnings Checked?Y

Manually select N

NAT files:

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

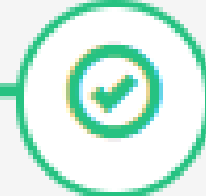
The NAT files are now available within a Zip that you can download in order to validate and then upload the reporting body


Claims Report


OPTIONS



CONTRACTS


WARNINGS


CONFIRM


EXPORT

Creation Status

 The report has been generated.

Report number: [VETREA00015](#)

Filename: [avetmiss8_1684732152.zip](#)

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 - 15 of 15 1 Page

Report ID	State	Report Type	Date	Claims	Open Claims
VETREA00015	TAS	AVETMISS (Skills Tasmania)	22 May 2023 3:09 PM	0	0
VETREA00014	TAS	AVETMISS (Skills Tasmania)	17 May 2023 4:10 PM	0	0

VETREA00015 Claims Reports

Edit Delete

Summary

Report ID: VETREA00015
State: Tasmania
Report Type: AVETMISS (Skills Tasmania)
Lodgement ID:
Date Submitted: 22 May 2023 3:09 PM
Submitted By: Bridgette Admin
Submission File: [avetmiss8_1684732152.zip](#)

Total Submitted: \$0.00
Total Received: \$0.00
Number of Claims: 0
Number of Open Claims: 0
Number of Enrolments Reported: 7
Number of Units Reported: 51

Claims

Filter by status: Filter

Download as:  Spreadsheet

Student/Unit	Name	Contract	Claim Status	Amount Submitted	Amount Received	Receipt #	Date Received
--------------	------	----------	--------------	------------------	-----------------	-----------	---------------

Claims Reports

Submit to NCVER

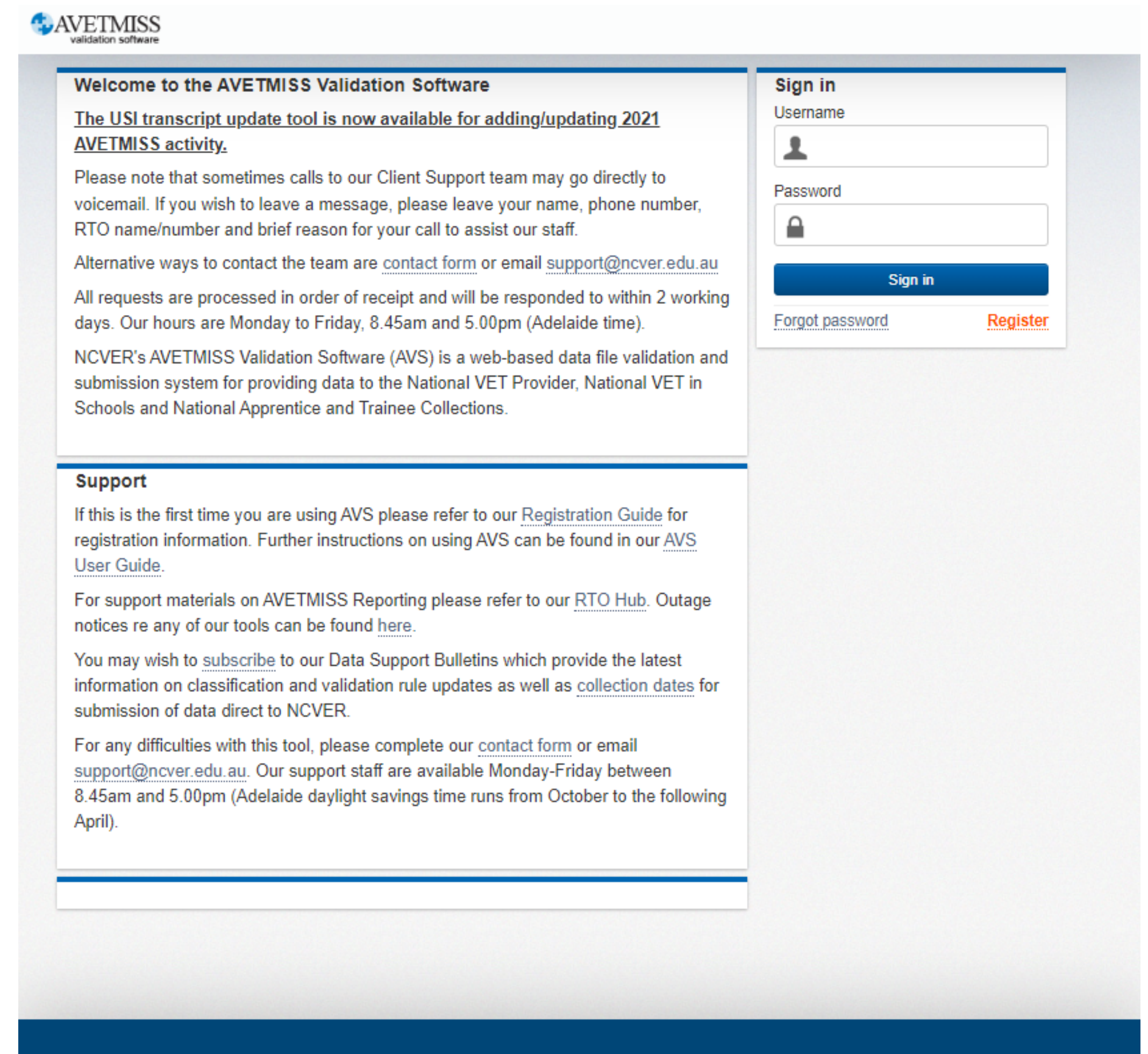
“The NAT files must then be uploaded to the NCVER AVETMISS Validation Software (AVS) in order to gain an error free Collection Processing Summary Report.”

AVS: <https://avs.ncver.edu.au/avs/>

You will need to save a copy of the Summary Report to submit with your NAT files to the reporting body

Reference:

https://skills.tas.gov.au/providers/rto/how_do_i_report_my_activity



AVETMISS
validation software

Welcome to the AVETMISS Validation Software

The USI transcript update tool is now available for adding/updating 2021 AVETMISS activity.

Please note that sometimes calls to our Client Support team may go directly to voicemail. If you wish to leave a message, please leave your name, phone number, RTO name/number and brief reason for your call to assist our staff.

Alternative ways to contact the team are [contact form](#) or email support@ncver.edu.au

All requests are processed in order of receipt and will be responded to within 2 working days. Our hours are Monday to Friday, 8.45am and 5.00pm (Adelaide time).

NCVER's AVETMISS Validation Software (AVS) is a web-based data file validation and submission system for providing data to the National VET Provider, National VET in Schools and National Apprentice and Trainee Collections.

Sign in

Username

Password

[Sign in](#)

[Forgot password](#) [Register](#)

Support

If this is the first time you are using AVS please refer to our [Registration Guide](#) for registration information. Further instructions on using AVS can be found in our [AVS User Guide](#).

For support materials on AVETMISS Reporting please refer to our [RTO Hub](#). Outage notices re any of our tools can be found [here](#).

You may wish to [subscribe](#) to our Data Support Bulletins which provide the latest information on classification and validation rule updates as well as [collection dates](#) for submission of data direct to NCVER.

For any difficulties with this tool, please complete our [contact form](#) or email support@ncver.edu.au. Our support staff are available Monday-Friday between 8.45am and 5.00pm (Adelaide daylight savings time runs from October to the following April).

Claims Reports

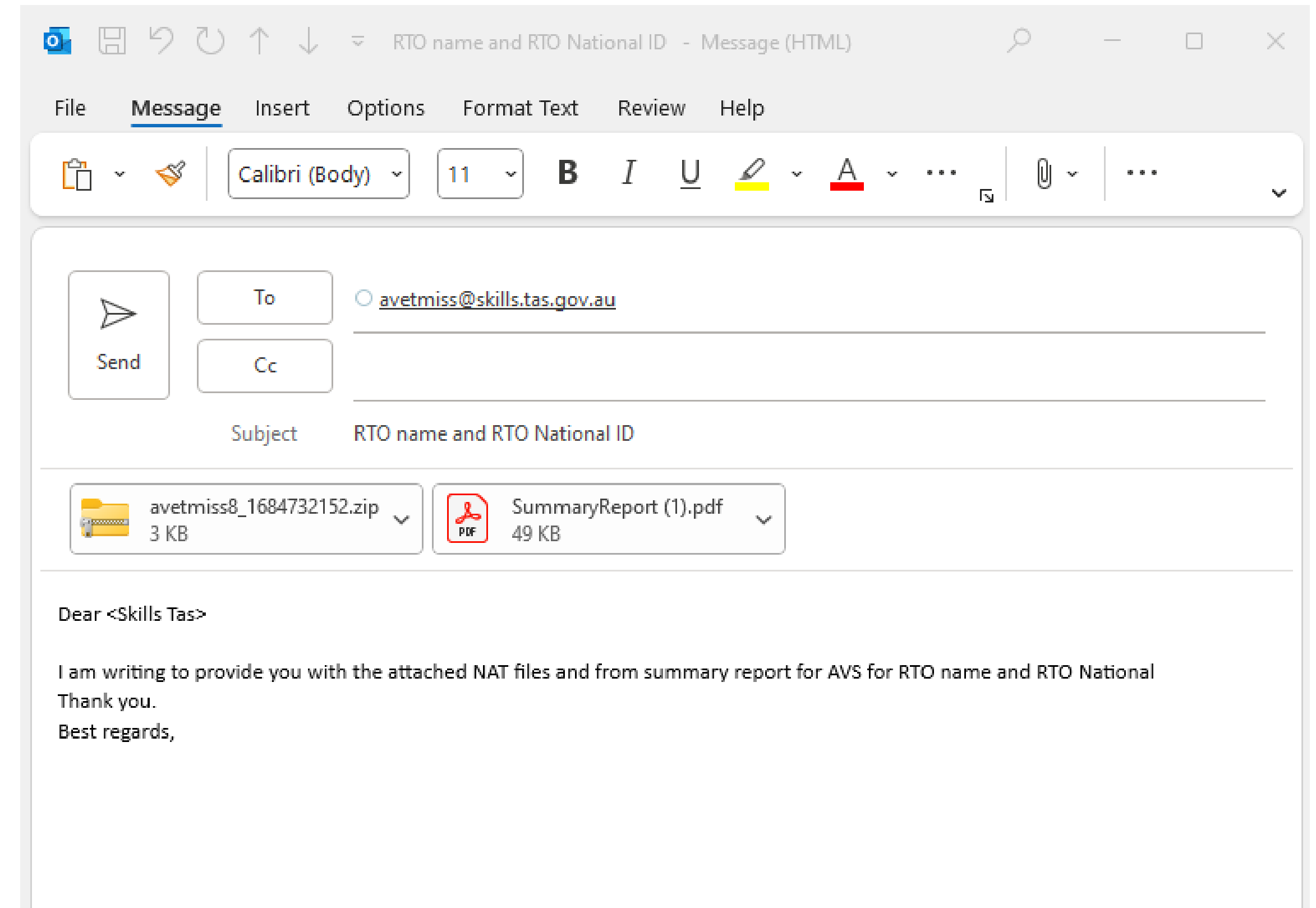
Send to Skills Tasmania

“Send the error free NAT files along with the summary report to avetmiss@skills.tas.gov.au

When submitting files via email, please include the RTO name and RTO National ID in the subject line of the email.”

Reference:

https://skills.tas.gov.au/providers/rto/how_do_i_report_my_activity



Claims Reporting

Error: 01019999

When validating Tasmanian state AVETMISS files through the AVS you may receive validation errors in the NAT00130 relating to the "01019999" for the Date Program Completed field.

Date Program Completed (01019999) must not be after date of validation (xxxxxxxx)

Date Program Completed (01019999) must not be after the Collection Period end date (xxxxxxxx)

Tasmanian requirements for AVETMISS state: "The Date Program Completed field should be entered as "01019999" if the Program Status Identifier field is equal to any of the following statuses" for programs that are not completed.

https://www.skills.tas.gov.au/_data/assets/pdf_file/0020/210953/Tasmanian_Specific_Reporting_Requirements_for_the_AVETMISS_VET_Provider_Collection_2021.pdf

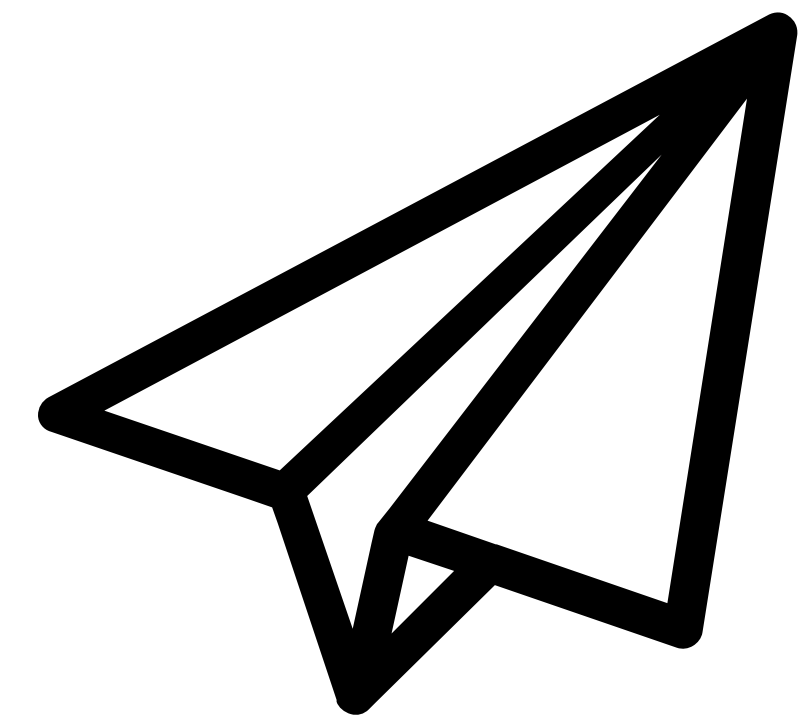
Claims Reporting

Error: 01019999

The error appears when validating through the AVS portal as it's invalid for NCVER reporting, but valid for Skills Tasmania.

You can ignore these errors and continue to submit your files to Skills Tasmania (if these are the **only** errors that appear in AVS).

If you have concerns or questions, contact Skills Tas or a compliance contact to verify you are reporting correctly.



Lets go do it!

Let's take a look at:

- Run a Claims Report



 **readytech**



Claims Payments



Claim Payment



NOTE!

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

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

Claims Payments

Adding Claims Data

You can keep track of claims data within the SMS

- 1. Add claim method and amount to Contract
- 2. Add nominal hours (if tracking via nominal hours)

VETREA00070 Claims Reports

Edit

Delete

Summary

Report ID: VETREA00070

State: Tasmania

Report Type: AVETMISS (Skills Tasmania)

Lodgement ID: 486476

Date Submitted: 8 August 2023 1:08 PM

Submitted By: gemma.cameron@readytech.io

Submission File: [avetmiss8_1691464115.zip](#)

Total Submitted: \$10,000.00

Total Received: \$6,950.00

Number of Claims: 4

Number of Open Claims: 0

Number of Enrolments Reported: 7

Number of Units Reported: 14

Claims

Filter by status:

Filter

Download as:

Spreadsheet

Student/Unit	Name	Contract	Claim Status	Amount Submitted	Amount Received	Receipt #	Date Received
Short, Austin: Business Strategy (BS2023)	Initial Payment (50%)	TAS Contract 1 (abc123)	Payment Received	\$2,500.00	\$1,250.00	6796	8/8/2023
Short, Austin: Business Strategy (BS2023)	Final Payment (50%)	TAS Contract 1 (abc123)	Payment Received	\$2,500.00	\$700.00	6796	8/8/2023
Short, Austin: Financial Accounting (FA2023)	Initial Payment (50%)	TAS Contract 1 (abc123)	Payment Received	\$2,500.00	\$2,500.00	6796	8/8/2023
Short, Austin: Financial Accounting (FA2023)	Final Payment (50%)	TAS Contract 1 (abc123)	Payment Received	\$2,500.00	\$2,500.00	6796	8/8/2023

1 - 4 of 4

1 Page

Support

Claims Payments

Update Contract

Add the claim method and \$ amount to your contracts

TAS Contract 1

Contracts

There are 7 enrolment(s) using this contract. Modifying the contract will affect all these enrolments.

Save

Cancel

Details

Enrolments

Programs

Contract Details

*Name:

TAS Contract 1

*Code:

abc123

*State/Region:

Tasmania

Funding Source:

*Program:

Tasmania - User Choice

Per Unit (\$):

500.0

Schedule:

Start Date:

End Date:

Reporting Period:

Acquitted:

☐

Enabled:

☒

Claims Payments

Nominal Hours

If using Nominal Hours:

Add Default Nominal Hours

Unit level nominal hours can be set for each unit of a student's enrolment

Administration > Curriculum > Units
> select unit > Details > Settings

The screenshot shows the 'Unit Edit' interface with the 'Settings' tab selected. The 'Default Nominal Hours' field is highlighted with a red box and contains the value 40. Other fields include Points, Expiry, and regional settings for South Australia, Tasmania, Western Australia, Queensland, Victoria, New South Wales, Australian Capital Territory, and Northern Territory. On the right, there are fields for Supervised Hours, Expires after (set to day), Exclude from Overall Score Calc, and Hide from Student Portal.

Claims Payments

Nominal Hours



Unit nominal hours can be edited at the individual enrolment level if required

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

Core

Bulk Actions

TGA Packaging Rules

Code	Unit	Outcome	Start Date	Target End Date	End Date	
<input type="checkbox"/> BS8CRT511	Develop critical thinking in others	Competent - 20	24/5/2023		24/5/2023	
<input type="checkbox"/> BS8FIN501	Manage budgets and financial plans	Competent - 20	24/5/2023		24/5/2023	

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:

State Specific

Unit Scheduled Hours

15 Nominal Hours

Unit Hours Attended:

Location:

-- Use Enrolment Value

Claims & Funding

Contract

ACT (ACT123)

Funding Source State:

-- Use Enrolment Value

Funding Source National:

-- Use Enrolment Value

Eligibility Exemption Indicator:

☐

Fee Exemption State:

-- Use Enrolment Value

VET Disable:

☐

Fees

Tuition Fee:

Fees (0)

International


Number Of Weeks:

Traineeship / Apprenticeship

TCID:

Delivering Org ABN:

Outcome Training Organisation:

 readytech

ReadyTech Education 447

Claims Payments

Adding Claims

Administration > Funding > Claims Reporting > select report > edit

For each unit, add the:

- Amount received
- Receipt number
- Date received

Save

VETREA00070 Claims Reports

Edit

Delete

Summary

Report ID: VETREA00070

State: Tasmania

Report Type: AVETMISS (Skills Tasmania)

Lodgement ID:

Date Submitted: 8 August 2023 1:08 PM

Submitted By: gemma.cameron@readytech.io

Submission File: avetmiss8_1691464115.zip

Total Submitted: \$10,000.00

Total Received: \$0.00

Number of Claims: 4

Number of Open Claims: 4

Number of Enrolments Reported: 7

Number of Units Reported: 14

Claims

Filter by status:

Filter

Download as:

Spreadsheet

Student/Unit	Name	Contract	Claim Status	Amount Submitted	Amount Received	Receipt #	Date Received
Short, Austin: Business Strategy (BS2023)	Initial Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00			
Short, Austin: Business Strategy (BS2023)	Final Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00			
Short, Austin: Financial Accounting (FA2023)	Initial Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00			
Short, Austin: Financial Accounting (FA2023)	Final Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00			

Update

Cancel

Summary

Report ID: VETREA00070

State: Tasmania

Report Type: AVETMISS (Skills Tasmania)

Lodgement ID: 486476

Date Submitted: 8 August 2023 1:08 PM

Submitted By: gemma.cameron@readytech.io

Submission File: avetmiss8_1691464115.zip

Total Submitted: \$10,000.00

Total Received: \$0.00

Number of Claims: 4

Number of Open Claims: 4

Number of Enrolments Reported: 7

Number of Units Reported: 14

Claims

Filter by status:

Filter

Update selected status to:

Payment Received

Set amount received to:

Amount Submitted

Blank

Set receipt number to:

6796

Set date received to:

8/8/2023

Select on all pages:

All

None

<input checked="" type="checkbox"/>	Student/Unit	Name	Contract	Claim Status	Amount Submitted	Amount Received	Receipt #	Date Received
<input checked="" type="checkbox"/>	Short, Austin: Business Strategy (BS2023)	Initial Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00		6796	8/8/2023
<input checked="" type="checkbox"/>	Short, Austin: Business Strategy (BS2023)	Final Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00		6796	8/8/2023
<input checked="" type="checkbox"/>	Short, Austin: Financial Accounting (FA2023)	Initial Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00		6796	8/8/2023

Claims Payments

View Claims

Enrolments > List All > select student > select enrolment > Claims

Amount received will now be visible against the enrolment

Short, Austin > Claims Details > ENREA00941

Claims

BB2023 / Bachelor of Business (Bachelor of Business (TAS))

Claiming

Claimable: Yes

Contract: TAS Contract 1 (abc123)

Predicted Funding: \$10,000.00 ⓘ

0%

Claims

Total Claims: 4

Claims: 0

Lodged: 4

Claims: 4

Remaining: 4

0%

Amount

Amount: \$10,000.00

Forecast: \$0.00

Amount: \$0.00

Lodged: \$0.00

Amount: \$0.00

Received: \$10,000.00

Amount: \$10,000.00

Remaining: \$0.00

Claims

BB2023 / Bachelor of Business (Bachelor of Business (TAS))

Claiming

Claimable: Yes

Contract: TAS Contract 1 (abc123)

Predicted Funding: \$10,000.00 ⓘ

100.0%

Claims

Total Claims: 4

Claims: 4

Lodged: 0

Claims: 0

Remaining: 0

143.88%

Amount

Amount: \$6,950.00

Forecast: \$10,000.00

Amount: \$10,000.00

Lodged: \$6,950.00

Amount: \$6,950.00

Received: \$0.00

Amount: \$0.00

Remaining: \$0.00

Student Contribution	
Student Contribution (Total):	\$0.00
Student Contribution (Per Unit):	\$0.00

Finalised Claims						
Name	Associated	Contract	Claimed	Hours	Amount	Received Status
Final Payment (50%)	Business Strategy (BS2023)	TAS Contract 1 (abc123)	8 August 2023 1:08 PM		\$2,500.00	\$700.00 Payment Received
Final Payment (50%)	Financial Accounting (FA2023)	TAS Contract 1 (abc123)	8 August 2023 1:08 PM		\$2,500.00	\$2,500.00 Payment Received
Initial Payment (50%)	Business Strategy (BS2023)	TAS Contract 1 (abc123)	8 August 2023 1:08 PM		\$2,500.00	\$1,250.00 Payment Received
Initial Payment (50%)	Financial Accounting (FA2023)	TAS Contract 1 (abc123)	8 August 2023 1:08 PM		\$2,500.00	\$2,500.00 Payment Received

Lets go do it!

Let's take a look at:

- Add received claims against an enrolment





Funding Reports

ReadyTech Education

Funding Reports

Standard Reports

The SMS has several standard reports that are useful 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 gives information for each contract and the students under them

This will give you an overview of the:

- Amount Claimed
- Amount Received
- Amount Scheduled

Report > Contract Overview

The Contract Overview Report can provide a full overview of selected Contracts. This report can be utilised to view claims made and due against a Contract, along with Contract totals (including values and student numbers) – useful to gain a full management overview of progress.

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:

Tasmania

Employer:

Sales/Agent:

☒ Include Child Employers

Course Filters

Program:

Course:

Course Type:

all

Academic:

Enrolment Status:

all

Report Criteria

Study Period:

Contract:

Support

Download as:

PDF Document

Spreadsheet


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Contract		Code	Schedule	State	Total Amount		Total Hours	Maximum Places		Students
TAS Contract 1		abc123		Tasmania	\$14000.00		30.0	500		7
Student	Party ID	Enrolment ID	Qualification	Start Date	End Date	Hours Claimed	Hours Scheduled	Amount Claimed	Amount Received	Amount Scheduled
Smith, Elliot	00020071	ENREA00917	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$0.00	\$0.00	\$0.00
Stone, Gabrielle	00020077	ENREA00921	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$0.00	\$0.00	\$0.00
Sprenke, George	00020063	ENREA00924	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$0.00	\$0.00	\$0.00
Sotherlands, Hannah	00020041	ENREA00927	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$0.00	\$0.00	\$0.00
Smith, Hillary	00020069	ENREA00931	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$0.00	\$0.00	\$0.00
Spoon, Jillian	00020026	ENREA00935	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$0.00	\$0.00	\$0.00
Short, Austin	00020079	ENREA00941	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$10000.00	\$6950.00	\$0.00
Sub-total:						140	0	\$10000.00	\$6950.00	\$0.00

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Funding Reports

Enrolment Claims Overview

This report is more detailed and will break information down per unit

You can see what has been claimed and when

Report > Enrolment Claims Overview

The Enrolment Claims Overview report will provide a listing by Student of the Enrolment claims from the claim schedule that are paid and due.

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:

Tasmania

Employer:

Sales/Agent:

☒ Include Child Employers

Course Filters

Program:

Course:

Course Type:

all

Academic:

Enrolment Status:

all

Report Criteria

Study Period:

21/7/2023

21/8/2023

Contract:

Produce


Support

Download as: PDF Document Spreadsheet

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Student	Party ID	Enrolment	Employer	Qualification	Start Date	End Date
Short, Austin	00020079	ENREA00941		BB2023 Bachelor of Business	8/8/2023	30/9/2023
Name	Unit	Contract	Claimed at	Predicted	Received	
Final Payment (50%)	Financial Accounting (FA2023)	TAS Contract 1	8/8/2023	\$2500.00	\$2500.00	
Initial Payment (50%)	Financial Accounting (FA2023)	TAS Contract 1	8/8/2023	\$2500.00	\$2500.00	
Final Payment (50%)	Business Strategy (BS2023)	TAS Contract 1	8/8/2023	\$2500.00	\$700.00	
Initial Payment (50%)	Business Strategy (BS2023)	TAS Contract 1	8/8/2023	\$2500.00	\$1250.00	
Sub-total:					\$10000.00	
Smith, Elliot	00020071	ENREA00917		BB2023 Bachelor of Business	8/8/2023	30/9/2023

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Lets go do it!

Let's take a look at:

- Running Standard reports
 - Contract overview
 - Enrolment Claims overview



Summary

What have we done today?

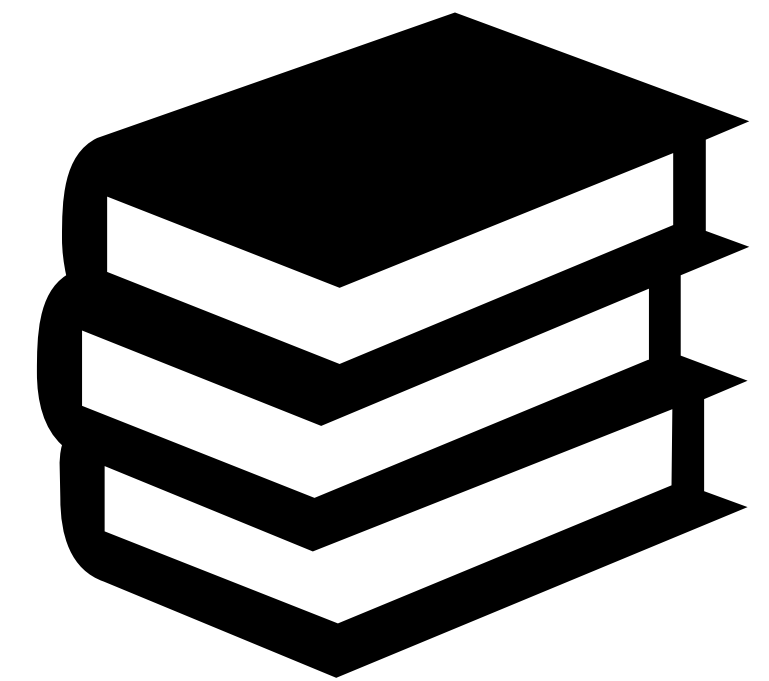
- Review state funding sources
- Create a contract
- Update finance information
- Required details for enrolment
- Entering a traineeship and/or apprenticeship
- Claims reporting
- Claims payments and funding reports (optional)



Action Items

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

- Add in locations in which training is delivered
- Add all funding contracts into the system
- Setup finance details
 - Setup and link Smart Fee library (if required/choosing this option)
- Create trainee/apprentice enrolment (if required)
- Enrol a student
- Submit a claims report



Enjoyed today's session?

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

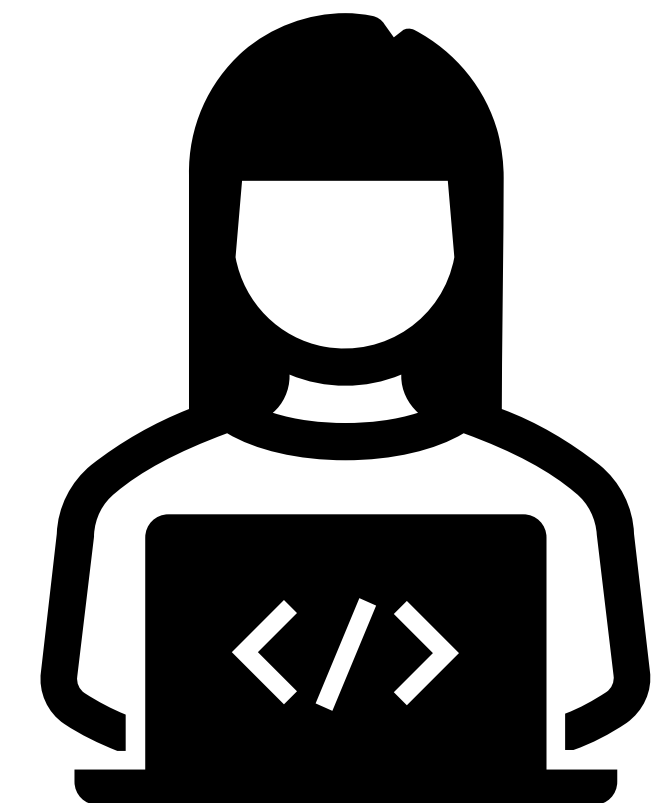
Here you will find all the information and resources for this series

- 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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