

# 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](https://www.skills.tas.gov.au/providers/rto/how_do_i_report_my_activity)



# State Funding Source



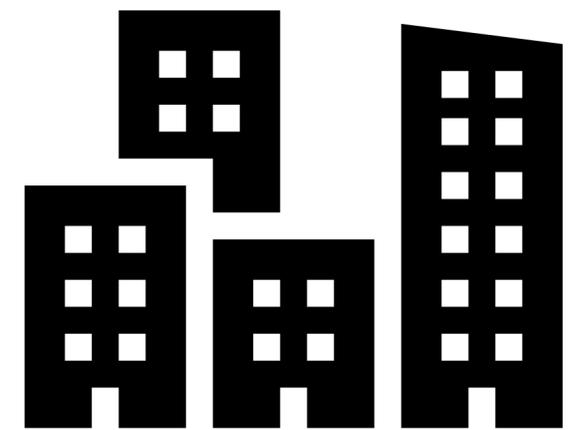
# State Funding Source

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](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 > Compliance Data > Funding Source State

Enable all Disable all

1 - 100 of 301 Page 1 of 4 1 2 3 4 - 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	<input type="checkbox"/>	285	<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	<input type="checkbox"/>	286	<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	<input type="checkbox"/>	287	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Learning Fund - Jobseeker - Full Qualification	120		Tasmania	Commonwealth and State general purpose recurrent	<input type="checkbox"/>	243	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Learning Fund - Jobseeker - Skill Set	121		Tasmania	Commonwealth and State general purpose recurrent	<input type="checkbox"/>	244	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Adult Learning Fund - Pre-Jobseeker - Full Qualification	122		Tasmania	Commonwealth and State general purpose recurrent	<input type="checkbox"/>	245	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Setup > New AVETMISS Reference Data Record > Funding Source State

save cancel

External ID:

Name:

Code:

Description:

Enabled:

Anzsic Code Required:

Traineeship:

State:

Funding Source National:

save cancel

# Lets go do it!

Let's take a look at:

- Adding a new funding source





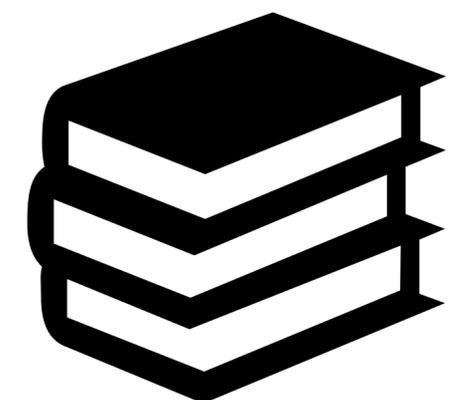
# Contracts

# 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](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

The screenshot shows a web interface for managing contracts. At the top, there are buttons for '+ New' and 'Reload Schedules'. Below these is a search bar with a 'Search' button and a checkbox for 'Include disabled contracts'. The main content is a table with the following columns: Name, Code, State/Region, Program, Amount, Acquitted, and Enabled. The table contains four rows of contract data. At the bottom right of the table, there are pagination controls showing '1 - 4 of 4' and '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"/>

The screenshot shows the 'New Contracts' form. At the top, there are 'Save' and 'Cancel' buttons. Below is a 'Contract Details' section with various input fields. A red box highlights the 'State/Region' dropdown menu, which is currently set to 'Tasmania'. Other fields include 'Name', 'Code', 'Funding Source', 'Program', 'Per Unit (\$)', 'Schedule', 'Start Date', 'End Date', 'Reporting Period', 'Acquitted', and 'Enabled'.

**Contract Details**

\*Name:

Code:

\*State/Region:

Funding Source:

\*Program:

Per Unit (\$):

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

The screenshot shows the 'Main' form for course creation. The 'State/Region' dropdown is highlighted with a red box and set to 'Tasmania'. Other fields include Course number (CSEREA00074), Name, AVETMISS Code (BSB50120), Program (Diploma of Business), Course Status, Tags, Location (Launceston), Cost Centre, Start Date (1/5/2023), End Date (31/5/2023), Enrolment Start, Enrolment End, Max Enrolments (0), Min Enrolments (0), Rating (5 stars), and Brand.

The screenshot shows the 'Claims & Funding' form. The 'Funding Source State' dropdown is highlighted with a red box. The 'Contract' dropdown is also highlighted with a red box. Other fields include VET Student Loans (checkbox), Priority, Contract (Start Typing...), Funding Source National, Fee Exemption State, Client Tuition Fee (\$ 0.00), and 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

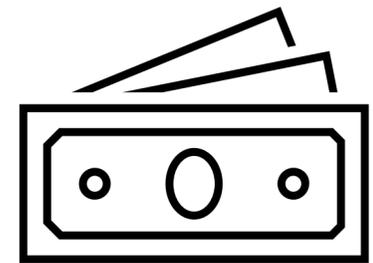
“Client tuition fee is the amount of tuition and/or administration fee charged to a client for a Subject or Program enrolment. “

## 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](https://www.skills.tas.gov.au/providers/rto/how_do_i_report_my_activity/tasmania_specific_reporting_requirements)



# Finance

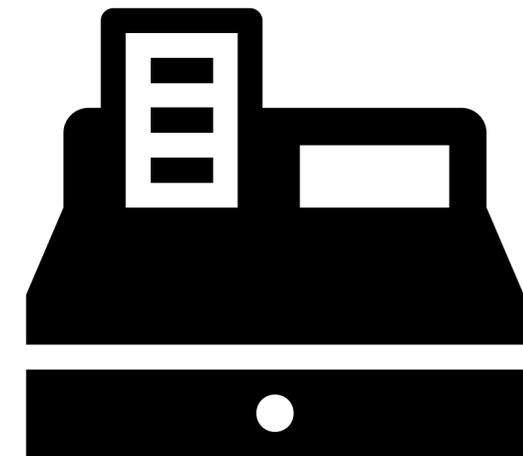
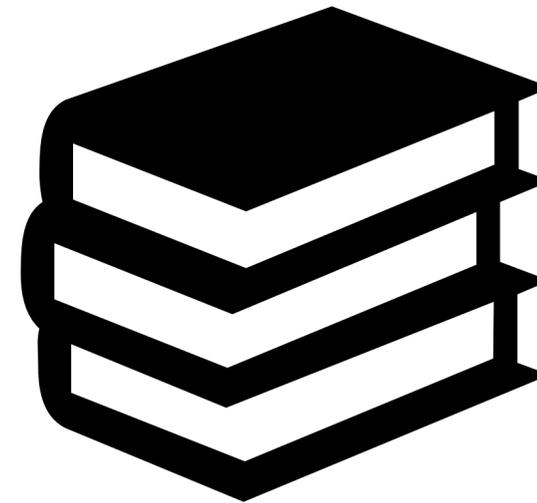
## Options

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
2. Linking to a Course
  - A. Manually linking to course
  - B. Automatic Smart Fee
3. Use during enrolment

**Edit Smart Fees**

[Save](#) [Cancel](#)

---

**Details**

*Name	<input type="text" value="Tas Tuition Fee"/>	Status	<input type="text" value="Approved"/>
Type	<input type="text" value="Tuition Fee"/>	Pricing Period	<input type="text"/>
Category	<input type="text" value="Course"/>	Start Date	<input type="text"/>
Description	<input type="text"/>	End Date	<input type="text"/>

---

**Settings**

Agent Commission	<input type="checkbox"/>	Enabled	<input checked="" type="checkbox"/>
Deferred Revenue	<input type="checkbox"/>	Scholarships	<input type="checkbox"/>
Discount (Code)	<input type="checkbox"/>		

---

**\$ Amount**

*Ledger	<input type="text" value="Enrolment Fees (123456)"/>	Subledger	<input type="text"/>
*Amount	<input type="text" value="\$ 7707.77"/>	Tax	<input type="text" value="GST Free"/>
Total	<input type="text" value="\$ 7707.77"/>	Multiplier	<input type="text" value="None"/>
Allow Amount Adjustment	<input checked="" type="checkbox"/>	Modifier Rules	<input type="text"/>

# 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:

Type:  (dropdown menu open with options: Tuition Fee, Resource Fee, Course Fee)

Category:

Description:

Status:  (dropdown)

Pricing Period:

Start Date:  ⓘ

End Date:  ⓘ

**Settings**

Agent Commission:  Enabled:

**Smart Fees Library**

+ New

Search:  Filters Saved Filters

Search Save Clear Import Export

**Search Results**

Bulk Actions 1 - 3 of 3 1 Page

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 FEES 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 ^

Description	Amount	Multiplier	Tax	Tax Amount	Total	
Tas Tuition Fee x	\$ 7707.77	None	GST Free	\$ 0.00	\$ 7707.77	⚙️ 🗑️
TAS - Resource Fee x	\$ 65.00	None	GST Free	\$ 0.00	\$ 65.00	⚙️ 🗑️

+ 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:

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: ENREA0038585B50120  
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](#)

The screenshot shows a web application interface for 'Tasmania' with the 'Claims & Funding' tab selected. The interface includes a navigation bar with tabs for 'Course Details', 'Trainee/Apprentice', 'Claims/Funding', 'Finance', 'Higher Ed', and 'Custom Details'. Below the navigation bar, there is a 'Contract:' dropdown menu set to 'Tas (TAS2365)'. The main content area is divided into two columns of form fields. The left column contains fields for 'Fee Exemption State' (set to 'Z: No Concession'), 'Funding Source National' (set to '11: Commonwealth and State general purpose recurrent'), 'Delivery Mode' (set to 'Combination of internal and e'), and 'Survey Contact Status' (set to 'Available for survey use'). The right column contains fields for 'Reporting Enabled' (checked), 'Funding Source State' (set to '60: User Choice Funding'), 'Eligibility Exemption Indicator' (unchecked), 'Referral', 'Employment Service Provider', 'Priority', 'Client Industry of Employment', and 'Client Occupation Identifier'. At the bottom of the right column, two fields are highlighted with a red box: 'Upfront Tuition Fee' and 'Upfront Resource Fee', both with empty input boxes and information icons.

# Lets go do it!

Let's take a look at:

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





# Enrolment



# 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

Progress bar: COURSE, STUDENT PROFILE, COMPANY, **ENROLMENT** (Set specific details into this enrolment), UNITS, SCHEDULING, OUTCOMES, FEES, PAYMENTS, CONFIRM

Buttons: < Back, X Cancel, Next >, Confirm Now

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:

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

Contract: Tas (TAS2365)

Tasmania

**Claims & Funding**

Fee Exemption State: Z: No Concession  
Reporting Enabled:   
\*Funding Source National: 11: Commonwealth and State general purpose recurrent  
Funding Source State: 60: User Choice Funding

# Enrolment

## Claims & Funding

Skills Tasmania has specific requirements during enrolment

Enrolments > Enrol Students

The screenshot shows a web form for enrolment in Tasmania. At the top, there is a 'Contract' dropdown menu set to 'Tas (TAS2365)'. Below this is a black header bar with 'Tasmania' written in white. The main content area is divided into two sections: 'Claims & Funding' and 'State Specific Data'. The 'Claims & Funding' section includes fields for 'Fee Exemption State' (set to 'Z: No Concession'), 'Funding Source National' (set to '11: Commonwealth and State general purpose recurrent'), 'Delivery Mode' (set to 'Combination of internal and e'), and 'Survey Contact Status' (set to 'Available for survey use'). There are also checkboxes for 'Reporting Enabled' (checked) and 'Eligibility Exemption Indicator' (unchecked), and dropdown menus for 'Funding Source State' (set to '60: User Choice Funding'), 'Referral', 'Employment Service Provider', and 'Priority'. The 'State Specific Data' section includes dropdown menus for 'FSWA Category', 'Delivery Mode Predominant', 'Client Industry of Employment', and 'Client Occupation Identifier'. At the bottom of this section, there are text input fields for 'Program Enrolment Identifier', 'Program Status Identifier', 'Upfront Tuition Fee', and 'Upfront Resource Fee', and a date field for 'Program Commencement Date' with an '[edit]' link. A red rectangular box highlights the 'Program Enrolment Identifier', 'Program Status Identifier', and 'Program Commencement Date' fields.

- **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)

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

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





# 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](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

COURSE | **STUDENT PROFILE** (Capture additional student details) | COMPANY | ENROLMENT | UNITS | SCHEDULING | OUTCOMES | FEES | PAYMENTS | CONFIRM

Cancel | Back | Next | Confirm Now

**Background**

Labour Force Status:

**Client Identifier:**  ⓘ

Country of Birth: Not Stated

Town/City of Birth:

Nationality: Australia

Indigenous Status:

Main Language: Not Stated

**Citizenship Details**

Citizenship Status: None of the above

Citizenship Effective From Date:  ⓘ

**School Details**

At School:  Not Stated  Yes  No

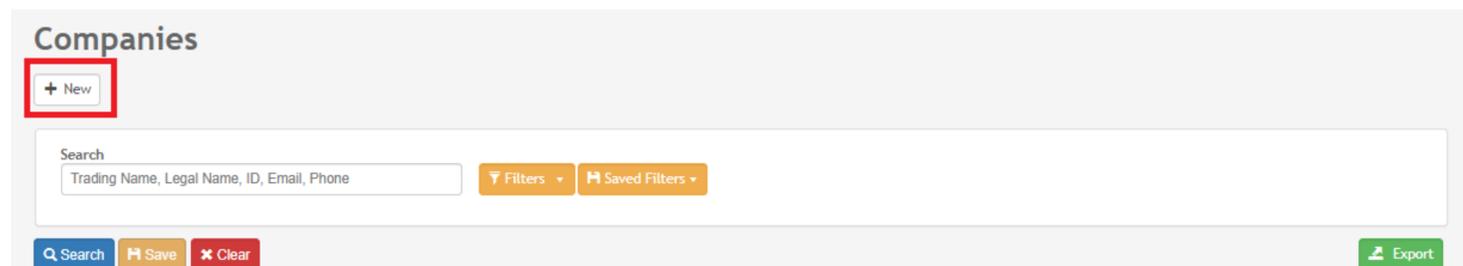
**Disability**

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



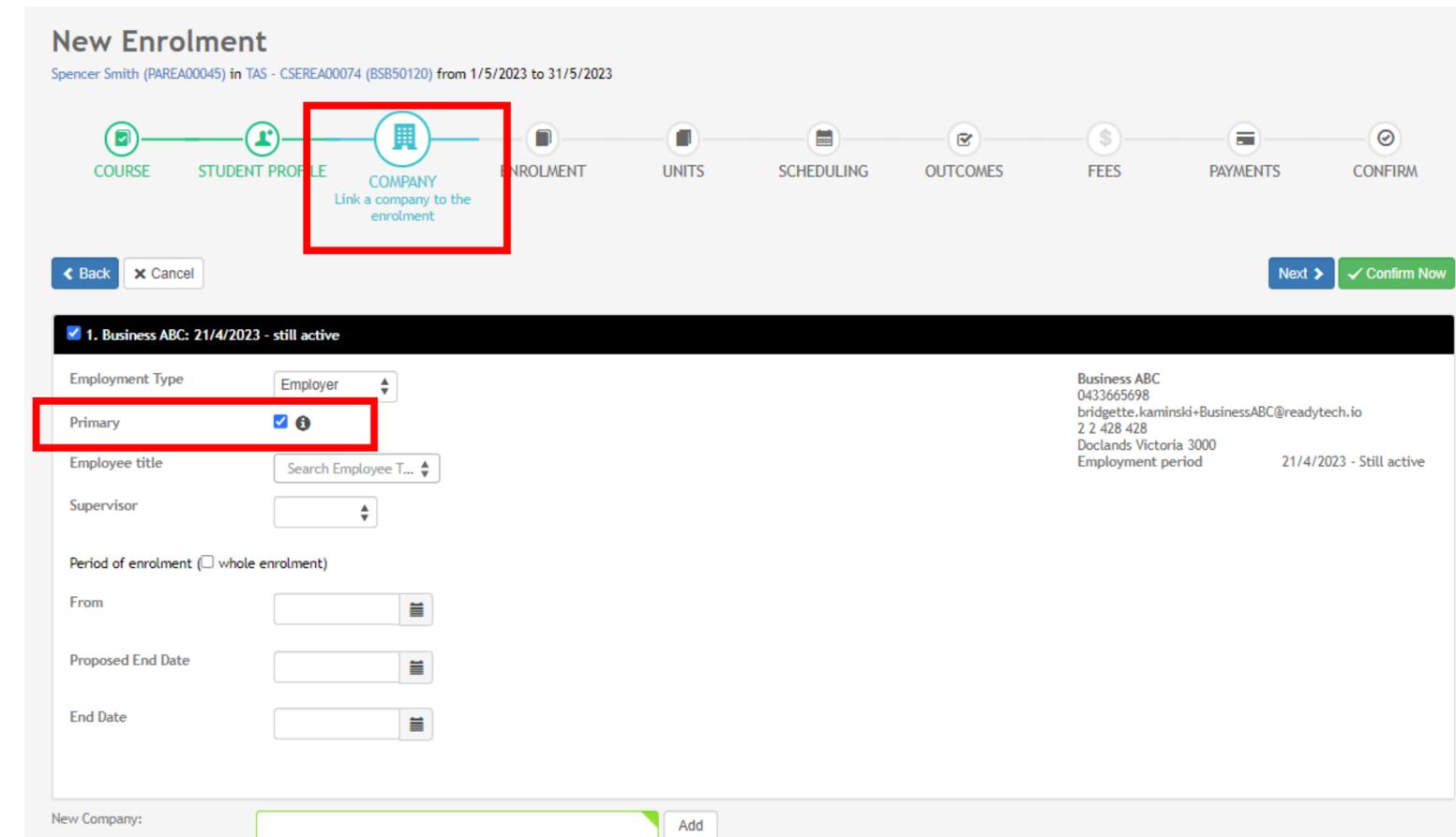
**Companies**

[+ New](#)

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

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

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



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

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

[Link a company to the enrolment](#)

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

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

Employment Type:

Primary [i](#)

Employee title:

Supervisor:

Period of enrolment  whole enrolment

From:

Proposed End Date:

End Date:

New Company:  [Add](#)

Business ABC  
0433665698  
bridgette.kaminski+BusinessABC@readytech.io  
2 2 428 428  
Doclands 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 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

The screenshot shows a web form for entering trainee/apprentice details. The form is titled "Trainee/Apprenticeship #1 - Active". It is divided into several sections:

- Details:** Includes fields for TCID (highlighted with a red box), Type (dropdown), AASN (dropdown), Mode (dropdown), Active (checkbox, checked, highlighted with a red box), and End Reason (dropdown).
- Employer:** Includes fields for Employer, Host Employer, and Secondary School, all with "Start Typing..." dropdown menus.
- Key Dates:** Includes a field "How long is the Traineeship/Apprenticeship?" with a numeric input (1, 2, 3, 4).
- Training Contract:** Includes fields for Contract Start Date, Contract End Date, Contract Status Date, Contract Status, and Contract State, all with "Start Typing..." dropdown menus. This entire section is highlighted with a red box.
- Finance:** Includes fields for Annual Leave Balance, Personal Leave Balance, and Pay Rate, all with text input fields.

At the bottom of the form, there are buttons for "Cancel", "Back", "Next", and "Confirm Now".

# Traineeship/Apprenticeship

## Enrolment – Complete Enrolment

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

### New Enrolment

Spencer Smith (PAREA00045) in TAS - CSERE00074 (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.
- AVETMISS - You need to enter a TCID if this enrolment is an Apprenticeship/Traineeship Training Contract.
- AVETMISS - Client ID must be entered into the Client ID field under Party AVETMISS details.

COURSE STUDENT PROFILE COMPANY ENROLMENT UNITS SCHEDULING OUTCOMES FEES PAYMENTS CONFIRM Review and confirm enrolment

Cancel Back Create

Person			
First Name(s):	Spencer	Party ID:	PAREA00045
Surname:	Smith	Date of Birth:	1 March 1990
Gender:	Male	Email:	Bridgette.kaminski+SpencersSmith@readytech.io

Companies	
Company:	Business ABC (Primary)
Employee Title:	

Course			
Course:	TAS	Core Units:	5
Program:	Diploma of Business	Elective Units:	7
Start Date:	1/5/2023	Stream Units:	0
Target End Date:	31/5/2023	Additional Units:	0

### Enrolment Details ENREA00400 / Spencer Smith (PAREA00045)

Student:	Spencer Smith (PAREA00045)	Enrolment ID:	ENREA00400
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:	

#### Summary

<b>Units</b>	<b>Attendance</b>	<b>Invoiced</b>	<b>Claims</b>
0%	0.00%	0.0%	0%
Total Units: 12 Total Units Completed: 0	Scheduled Hours: 0.0 Attended Hours: 0.0	Total Projected: \$0.00 Total Invoiced: \$0.00	Total Claims: 24 Total Invoiced: 0

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

#### Course Details

Worker Type:	New Worker	Study Mode:	Full Time
Academic:	Bridgette Trainer (PAVET00006)	Qualification Level:	Diploma/421
Other Academic:		VETIS:	<input type="checkbox"/>
Coordinator:		Course Type:	
Location:	Launceston	Study Reason:	Not Specified
Study Period:		COE ID:	
Total Number of Weeks:		COE Status:	
Paid Number of Weeks:		COE Issue Date:	
Tier:		Specialisation:	
Region:			
Arrival Date:			

#### 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.

Enrolment Edit ENREA00400 / Spencer Smith (PAREA00045)

Save Cancel

Course: CSEREA00074 / 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

Trainee/Apprenticeship #1 - Active

Details

TCID: Training Plan Signed:

Type: Initial Skills Assessment:

AASN: Training Provider: Start Typing...

Mode:

Active:  End Reason:

Employer: 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

Diploma of Business (TAS) Details

CSEREA00074 | 1/5/2023 - 31/5/2023

Employers 1 / 0

Certificates 0

Finance

Balance: \$-12500.00

Schedule

Notes / Checklists 3 +

Email

Units

Electives

Attendance

Events

Claims

Fees

Invoice options

Employers

Transfer

### Edit Employers ENREA00400 | Spencer Smith (PAREA00045)

Save Cancel

Student: Spencer Smith (PAREA00045) Enrolment ID: ENREA00400  
Course: CSEREA00074 / 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:

#### 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:

Save Cancel

# Lets go do it!

Let's take a look at:

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





# 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	QUALIFICATION NAME (course.course_scope.name)	QUALIFICATION NATIONAL CODE (course.course_scope.code)
APPRENTICE / TRAINEE	FULL NAME (party.other_name) (party.middle_name) (party.name)	REGISTRATION NUMBER (student.cid)
Employer	LEGAL NAME: #(if party.employer) (party.employer.name) #(end)	TRADING NAME: #(if party.employer) (party.employer.other_name) #(end)
	Is the apprentice/ trainee hosted?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Registered Training	RTO NATIONAL CODE: #(if role.ro) (role.rto.ro_identifier) #(end)	CONTACT PERSON: #(if student.course.trainer_staff) (student.course.trainer_staff.party.other_name) #(end) # (if student.role_staff) (student.role_staff.party.other_name) #(end)
	RTO TRADING NAME:	TELEPHONE:

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



# 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 NCVET 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](mailto: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.”

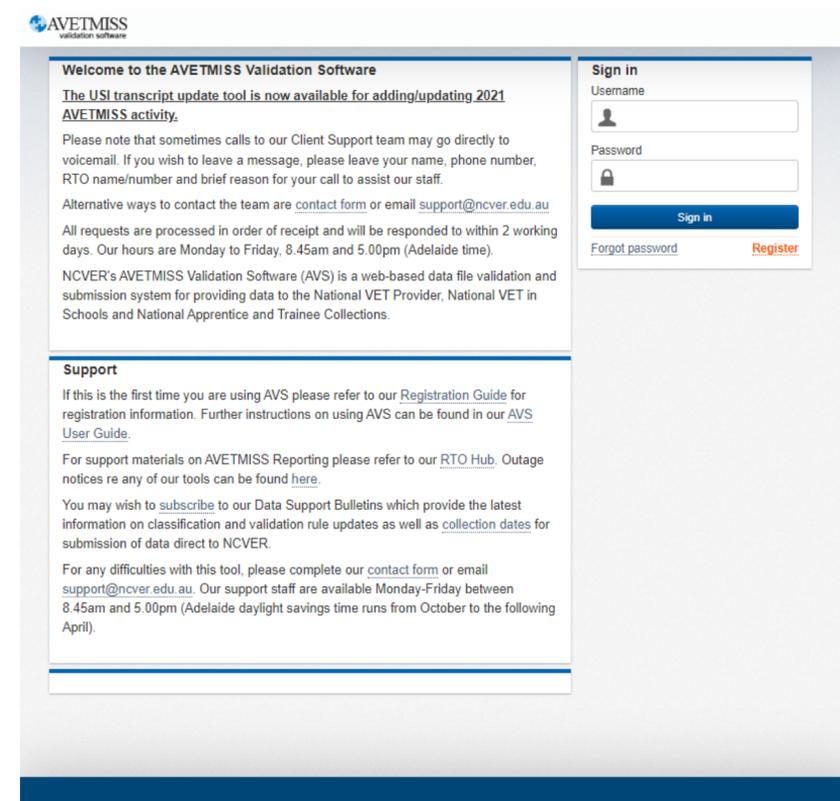
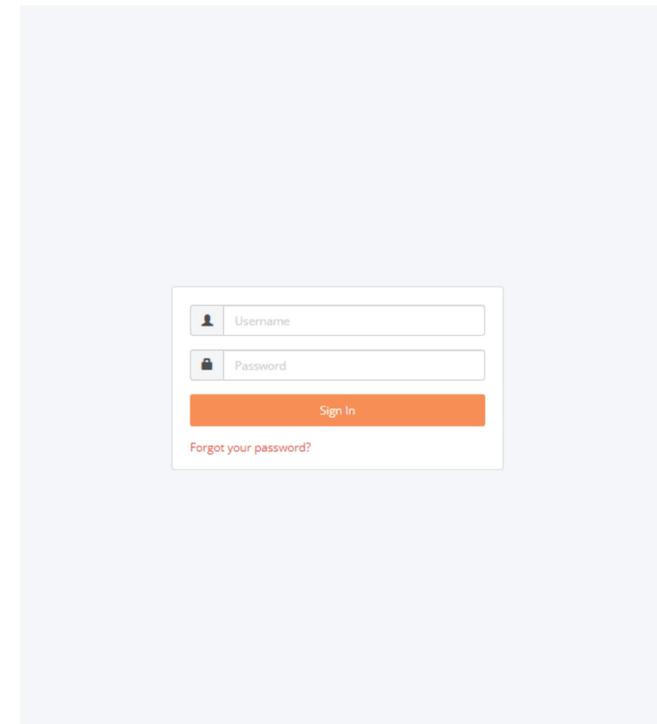
Reference: [https://skills.tas.gov.au/providers/rto/how\\_do\\_i\\_report\\_my\\_activity](https://skills.tas.gov.au/providers/rto/how_do_i_report_my_activity)

# 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

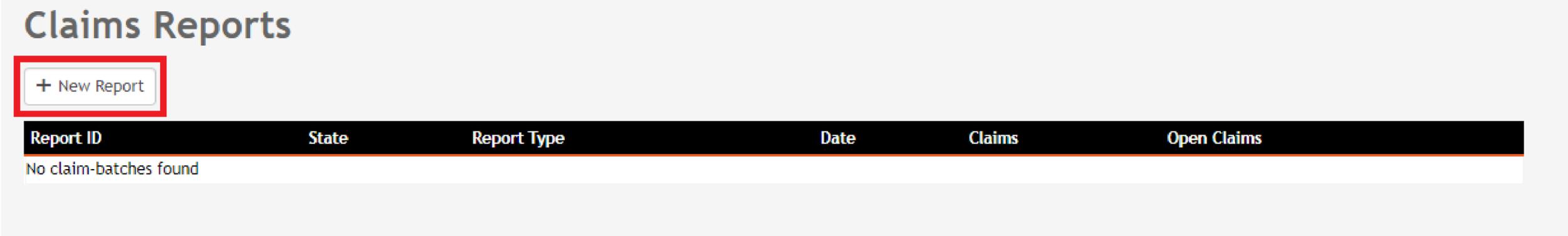
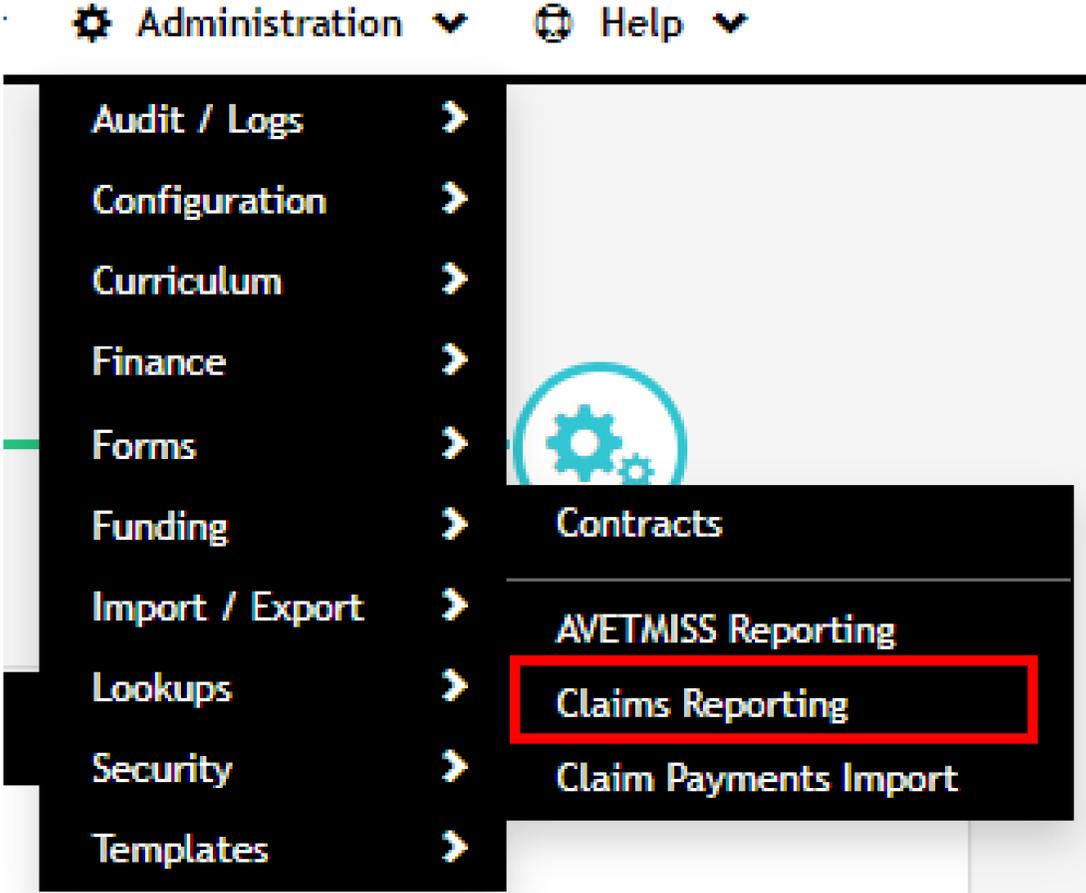


# Reporting

## How

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

Administration > Funding > Claims Reports



# Claims Reports

## 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 (Choose extract options), CONTRACTS, WARNINGS, CONFIRM, and EXPORT. The 'OPTIONS' step is currently active. Below the progress bar, there is a 'Cancel' button on the left and a 'Next >' button on the right. The main content area is titled 'Report Type' and contains a 'State/Region:' dropdown menu with 'New South Wales' selected. Below this, the 'Report Type:' field is empty, and a message states: 'No report types available for this state. Please set up a contract.'

The screenshot shows the 'Claims Report' interface with the same progress bar as above. The 'State/Region:' dropdown menu now has 'Tasmania' selected. Below this, the 'Report Type:' field is populated with 'AVETMISS (Skills Tasmania)'. A message below reads: 'Extracts all AVETMISS data to a zip file for upload to Skills Tasmania.' There is also an 'Activity year:' dropdown menu with '2023' selected and a checkbox for 'Manually select NAT files' which is currently unchecked.

# Claims Reports

## Contracts

Select the appropriate Contracts for your report

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

The screenshot displays the 'Claims Report' interface. At the top, a progress bar shows five steps: OPTIONS, CONTRACTS (highlighted in green), WARNINGS, CONFIRM, and EXPORT. Below the progress bar, there are navigation buttons: 'Cancel', 'Back', and 'Next'. The main content area is divided into two sections: 'Contracts' and 'Filters'. The 'Contracts' section has a header 'Contracts' and a list of items with checkboxes: 'Select all', '202302 (202302)', and 'Tas (TAS2365)'. Below this list are three filter options: 'Include enrolments without a contract', 'Include only enrolments with claiming enabled', and 'Include ONLY enrolments that have claims due'. The 'Filters' section has a header 'Filters' and a note: '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.' Below this note are two filter options: 'Enrolment Filter' and 'Course Filter'.

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**

Progress bar: OPTIONS (SEARCH), CONTRACTS (DOCUMENT), **WARNINGS (WARNING)** - Check for known warnings, CONFIRM (CHECK), EXPORT (GEARS)

Buttons: 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**

Progress bar: OPTIONS (SEARCH), CONTRACTS (DOCUMENT), **WARNINGS (WARNING)** - Check for known warnings, CONFIRM (CHECK), EXPORT (GEARS)

Buttons: 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) [BSB50120]	
<ul style="list-style-type: none"><li>AVETMISS - The Unique Student Identifier has not been recorded</li><li>AVETMISS - An identification record such as a passport number is required for USI application</li></ul>	
ENREA00316 - Summer, Emma (PAREA00039) - Diploma of Business (CSEREA00051) [BSB50120]	
<ul style="list-style-type: none"><li>AVETMISS - You need to enter at least one full address</li><li>AVETMISS - Highest School Level is blank. Please review before submission</li><li>AVETMISS - Indigenous Status is blank. Please review before submission</li><li>AVETMISS - Main Language is blank. Please review before submission</li><li>AVETMISS - Employment Category is blank. Please review before submission</li></ul>	

# 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**

Progress bar steps: OPTIONS, CONTRACTS, WARNINGS, CONFIRM (Review and confirm extract), EXPORT

Buttons: Cancel, Back, Create

**Summary**

State:	Tasmania	Contracts:	
Report Type:	AVETMISS (Skills Tasmania)		• 202302 (202302)
Avetmiss Version:	8.0		• Tas (TAS2365)
Activity Year:	2023		
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.

📄 [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**

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	Total Submitted:	\$0.00
State:	Tasmania	Total Received:	\$0.00
Report Type:	AVETMISS (Skills Tasmania)	Number of Claims:	0
Lodgement ID:		Number of Open Claims:	0
Date Submitted:	22 May 2023 3:09 PM	Number of Enrolments Reported:	7
Submitted By:	Bridgett Admin	Number of Units Reported:	51
Submission File:	avetmiss8_1684732152.zip		

#### 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

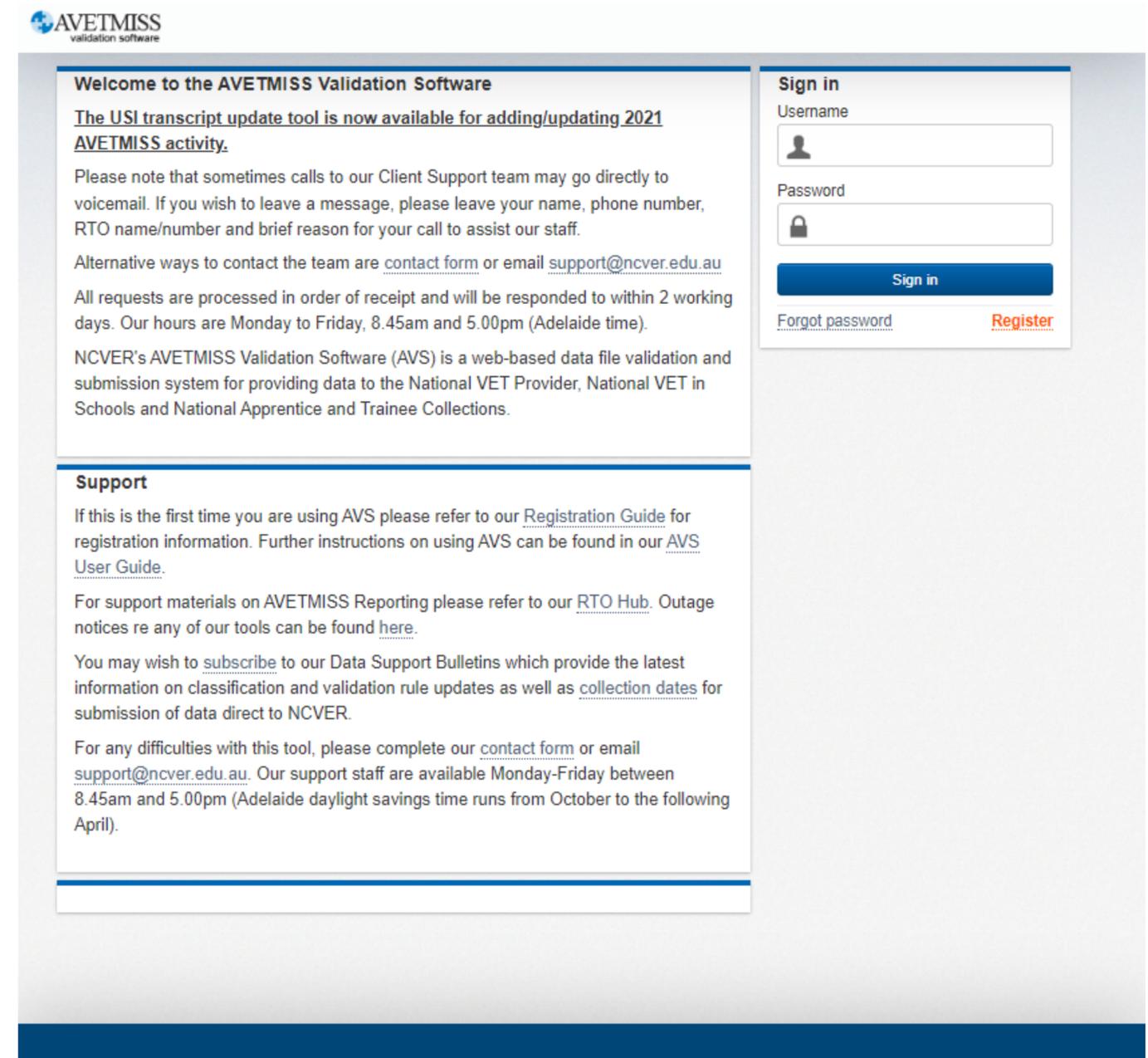
“The NAT files must then be uploaded to the NCVER AVETMISS Validation Software (AVS) in order to gain an error free Collection Processing Summary Report.”

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](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](mailto: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

[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](mailto: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

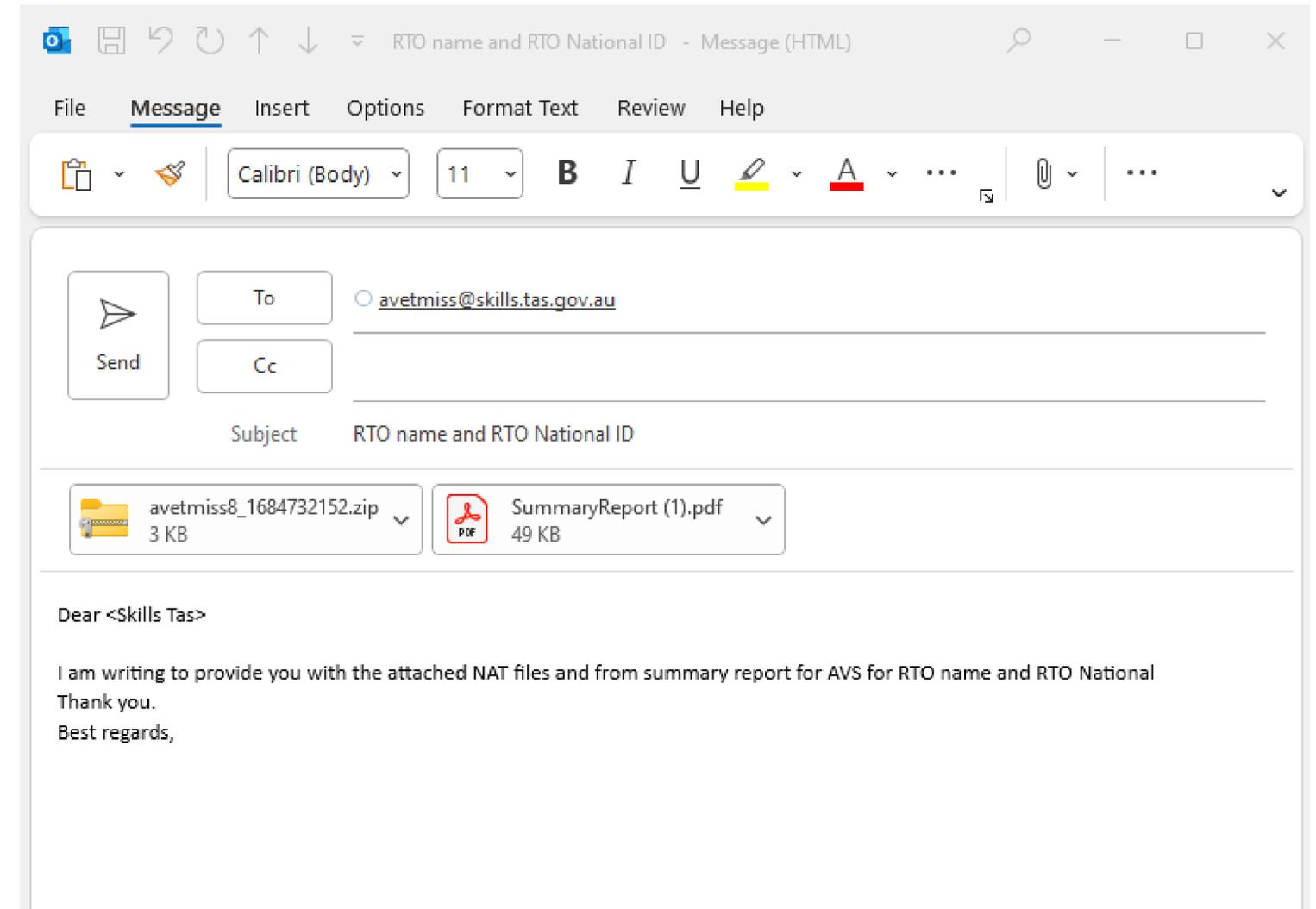
## Send to Skills Tasmania

“Send the error free NAT files along with the summary report to [avetmiss@skills.tas.gov.au](mailto: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](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](https://www.skills.tas.gov.au/_data/assets/pdf_file/0020/210953/Tasmanian_Specific_Reporting_Requirements_for_the_AVETMISS_VET_Provider_Collection_2021.pdf)

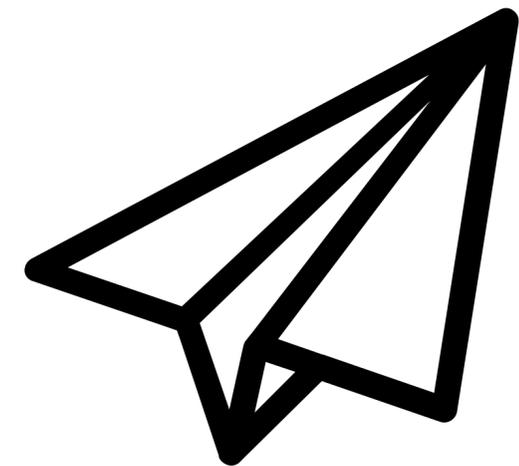
# Claims Reporting

## 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





# 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	Total Submitted:	\$10,000.00
State:	Tasmania	Total Received:	\$6,950.00
Report Type:	AVETMISS (Skills Tasmania)	Number of Claims:	4
Lodgement ID:	486476	Number of Open Claims:	0
Date Submitted:	8 August 2023 1:08 PM	Number of Enrolments Reported:	7
Submitted By:	gemma.cameron@readytech.io	Number of Units Reported:	14
Submission File:	avetmiss8_1691464115.zip		

---

**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	Schedule:	
*Code:	abc123	Start Date:	
*State/Region:	Tasmania	End Date:	
Funding Source:		Reporting Period:	
*Program:	Tasmania - User Choice	Acquitted:	<input type="checkbox"/>
Per Unit (\$):	500.0	Enabled:	<input checked="" type="checkbox"/>

# 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 side, 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

The screenshot displays the 'Core' system interface for editing a unit. At the top, there are buttons for 'Bulk Actions' and 'TGA Packaging Rules'. Below this is a table with columns: Code, Unit, Outcome, Start Date, Target End Date, and End Date. Two units are listed: BS8CRT511 (Develop critical thinking in others) and BS8FIN501 (Manage budgets and financial plans). The 'Unit Scheduled Hours' field in the 'State Specific' section is highlighted with a red box. The current value is 15 Nominal Hours.

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:

# 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	Total Submitted:	\$10,000.00
State:	Tasmania	Total Received:	\$0.00
Report Type:	AVETMISS (Skills Tasmania)	Number of Claims:	4
Lodgement ID:		Number of Open Claims:	4
Date Submitted:	8 August 2023 1:08 PM	Number of Enrolments Reported:	7
Submitted By:	gemma.cameron@readytech.io	Number of Units Reported:	14
Submission File:	avetmiss8_1691464115.zip		

### 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			

[Support](#) 1 - 4 of 4 1 Page

[Update](#) [Cancel](#)

### Summary

Report ID:	VETREA00070	Total Submitted:	\$10,000.00
State:	Tasmania	Total Received:	\$0.00
Report Type:	AVETMISS (Skills Tasmania)	Number of Claims:	4
Lodgement ID:	486476	Number of Open Claims:	4
Date Submitted:	8 August 2023 1:08 PM	Number of Enrolments Reported:	7
Submitted By:	gemma.cameron@readytech.io	Number of Units Reported:	14
Submission File:	avetmiss8_1691464115.zip		

### Claims

Filter by status:  [Filter](#)

Update selected status to:  [Filter](#)

Set amount received to:

Set receipt number to:

Set date received to:

Select on all pages:  All  None

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	<input type="text"/>	<input type="text" value="6796"/>	<input type="text" value="8/8/2023"/>
<input checked="" type="checkbox"/> Short, Austin: Business Strategy (BS2023)	Final Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00	<input type="text"/>	<input type="text" value="6796"/>	<input type="text" value="8/8/2023"/>
<input checked="" type="checkbox"/> Short, Austin: Financial Accounting (FA2023)	Initial Payment (50%)	TAS Contract 1 (abc123)	Lodged	\$2,500.00	<input type="text"/>	<input type="text" value="6796"/>	<input type="text" value="8/8/2023"/>

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# 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 Lodged: \$0.00  
 Amount Received: \$0.00  
 Amount Remaining: \$10,000.00

### 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 Lodged: \$6,950.00  
 Amount Received: \$0.00  
 Amount 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

# 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 give 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	50.00	50.00	50.00
Stone, Gabrielle	00020077	ENREA00921	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	50.00	50.00	50.00
Sprenke, George	00020063	ENREA00924	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	50.00	50.00	50.00
Sotherlands, Hannah	00020041	ENREA00927	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	50.00	50.00	50.00
Smith, Hillary	00020069	ENREA00931	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	50.00	50.00	50.00
Spoon, Jillian	00020026	ENREA00935	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	50.00	50.00	50.00
Short, Austin	00020079	ENREA00941	BB2023 Bachelor of Business	8/8/2023	30/9/2023	20	0	\$10000.00	\$6950.00	50.00
Sub-total:						140	0	\$10000.00	\$6950.00	50.00

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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

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:

Employer:  Sales/Agent:

Include Child Employers

Course Filters

Program:  Course:

Course Type:  Academic:

Enrolment Status:

Report Criteria

Study Period:  -

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

# 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

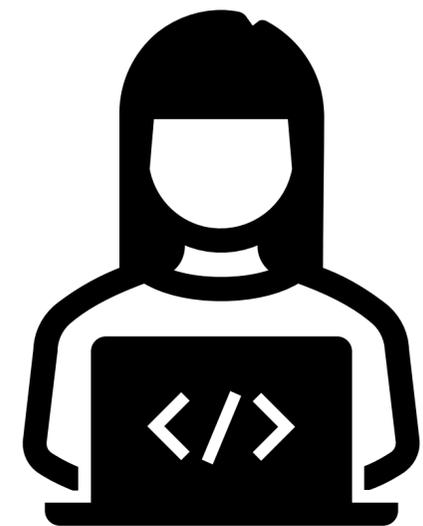
Here you will find all the information and resources for this series

- 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

For more information please contact:

## Support

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## Onboarding

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