SMART & SKILLED USER GUIDE
STAFF ASSISTED ENROLMENT

29 MARCH 2017 V. 1.2
STAFF ASSISTED ENROLMENT

This fact sheet focuses on the changes in ebs client for staff assisted enrolment for both new and existing learners into Smart & Skilled Offerings.

To learn about Smart & Skilled eligibility, refer to Smart Space Smart and Skilled eligibility checklist

1. Summary of changes

• A range of new fields have been incorporated into ebs Client to enable assessment of learner eligibility and calculation of fees; and to enable compliance with the requirements of the Input file to obtain a CID.

• For the most part these new fields are not required for enrolments into non Smart & Skilled Offerings - see summary in the tables alongside.

• A new Fee Calculator button is now available to enable re-calculation of fees when waivers are manually applied or changes are made to the learner record.

• The Transfer Wizard is only available in the following scenarios where indicated with a Yes:

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>Individual</th>
<th>Bulk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart &amp; Skilled</td>
<td>Non Smart &amp; Skilled</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Smart &amp; Skilled</td>
<td>Smart &amp; Skilled</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Non Smart &amp; Skilled</td>
<td>Smart &amp; Skilled</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Non Smart &amp; Skilled</td>
<td>Non Smart &amp; Skilled</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

In the scenarios identified with a No above, the current workaround is to withdraw a learner and create a new enrolment.

The Staff Assisted process in ebs Client does not incorporate the system validations that exist in the Enrolment Portal; e.g. highest post school qualification is derived via the portal, but needs to be manually entered in Client.

2. Additional data fields

Additional data is captured against the learner record. An explanation of all new fields, and accompanying screenshots is provided in pages 4 and 5.

The table below outlines where the new learner record fields are only required for Smart & Skilled Offerings, and where the new fields should be used for all staff assisted enrolments regardless of Offering Type.

<table>
<thead>
<tr>
<th>Applies to S&amp;S Offerings only</th>
<th>Applies to all Offerings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post School Qualifications</td>
<td>USI Manually verified checkbox</td>
</tr>
<tr>
<td>Highest Post School Qualification</td>
<td>Disability Status</td>
</tr>
<tr>
<td>Achieved since 17</td>
<td>Disability Assessment Type</td>
</tr>
<tr>
<td>Foundation Skills</td>
<td></td>
</tr>
</tbody>
</table>

Additional data is also captured against the enrolment at the point an enrolment is created. An explanation of all new fields and accompanying screenshots is provided on pages 6 and 7.

<table>
<thead>
<tr>
<th>Applies to S&amp;S Offerings only</th>
<th>Normal or Employment / STS radio button</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprentice/Trainee Code (updated dropdown)</td>
<td>Normal</td>
</tr>
<tr>
<td>Employer name/ postcode / suburb</td>
<td>Employment / STS</td>
</tr>
<tr>
<td>LTU Evidence</td>
<td>Employment / STS</td>
</tr>
<tr>
<td>Rehabilitation for a disability</td>
<td>Employment / STS</td>
</tr>
<tr>
<td>Evidence for Rehabilitation</td>
<td>Employment / STS</td>
</tr>
<tr>
<td>Welfare Status</td>
<td>Employment / STS</td>
</tr>
<tr>
<td>ESP Client, ESP Organisation, ESP Referral, ESP Referral ID</td>
<td>Employment / STS</td>
</tr>
<tr>
<td>Apprentice/Trainee Type</td>
<td>Employment / STS</td>
</tr>
<tr>
<td>Social Housing/Waitlist</td>
<td>Employment / STS</td>
</tr>
</tbody>
</table>

When an enrolment is saved, the STS Region and Program Stream is assigned by the system - refer to pages 8 and 9 for full details.

Additional data is also populated when the Results file from the Online provider Calculator is imported. Full details on these changes is available in the Batch Notification for a CID QRG.
Steps to eligibility

1. All students must meet Smart & Skilled personal eligibility (excluding Smart & Skilled Apprenticeships and Traineeships) THEN

2. Students must meet Program eligibility THEN

3. Fees and eligibility for exemptions and concessions are applied
   - There are exemptions for eligible students for all qualification levels
   - There are concessions for eligible students for certificates up to and including Certificate IV THEN

4. Eligibility for fee-free scholarships is determined

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Page 3
The USI Number will be checked for format and uniqueness (within a single ebs instance only). It must be made up of 10 characters (excluding letters O and I; and numbers 2 and 9).

USI validation and allocation of the USI with the USI Registry will be automated via a button click and web service call in Client.

There is a **Date USI Verified** field that is populated when the verified USI is returned from the USI Registry. If the USI is edited, the **Date USI Verified** stamp is removed automatically when the record is saved.

The USI field will only be editable by users with the **Edit Verified USI** role (new ebs role) thus protecting a verified USI from being deleted.

The **USI Manually Verified** checkbox has been removed as it is not required.

There are 2 new disability fields that replace the disability flag.

**Disability Status** has a drop down menu with 3 values
- (0) No, I don’t have a disability
- (1) I am a dependent child/ spouse/ partner of a person on a Disability Support Pension (DSP)
- (2) Yes, I have a disability

Note, if a learner has a disability, the **Disability Assessment Type** should be recorded, and a Disability record created for AVETMISS reporting purposes.

Refer to page 11 for a guide on how to apply the Disability Concession or Exemption fee.
Validating Learner Address for Commitment ID

Addresses need to be validated in ebs to obtain a Commitment ID for the learner.

ebs uses address validation software which helps standardise the addresses into a given format and it checks whether the address is correct or not based on the known addresses in the software. The known addresses are provided by a Commonwealth list of approved addresses and are updated every 3 months.

How to validate an address

1. Enter the information in the address fields – Street Number, Street Name, Suburb, Postcode
2. Click on search icon at end of Street Name field. This will activate a drop list of addresses to match. If match is found, click on address to populate fields in correct format.

If address cannot be validated

1. Enter the correct address in ebs and save the record
2. Log into the Training Services Portal and try and obtain the Commitment ID via the single process (Please refer to QRG – Notification for a CID – Batch & Single Process v1.5 for more details on this process.)

If the address also doesn't exist in the Portal follow Step 3

3. Email mailto:training.market@industry.nsw.gov.au or call (02) 9266 8008 to ask for help
Ensure that the SRN and DEC User ID is created before the course enrolment is added. For instructions go to Appendix 1.

This must be done before the enrolment is added or the learner User ID account will not auto provision.
1. Once in the Enrolments tab, search for and select the required Product Code.
2. Select the appropriate Cal Occ Code from the drop down list.
3. Progress Code and Progress Date will update automatically. There is no need to select a Progress Reason at this stage. Only update when progressing the enrolment.
4. Change the Source of Funding if required by selecting the drop down list. If left unchanged, it will default to the Source of Funding entered in the Product Offering.
5. Select the Agree Learner Declaration field.
6. Complete the Study Reason field.
7. Complete the Marketing Source field.
8. Change Who to Pay by selecting from the drop down box. The default is set to learner.
9. Click the Pay by Instalments flag if the learner would like to take up an instalment plan.
10. Select an Apprentice/Trainee Code (used with Program Stream validation to determine if the App/Tra fee is assigned): (A) Apprentice, (T) Trainee, (N) Neither.
11. Review the information in the Product Offering box to ensure it is correct.

Key changes are highlighted in the boxes. All other steps as per standard process.
Where a learner is an **ESP Client**, select the **ESP Client** checkbox, enter the **ESP Organisation ID** and enter the **ESP Client ID** to the Learner Training Identifier field.

If the learner has been referred by an **ESP**, select the **ESP Referral** checkbox and enter the ESP referral ID in the **ESP Referral Identifier** field. If this is unknown and not provided by an **ESP**, copy the Learner Training Identifier to this field.

**Apprentice Trainee Type** to be selected from drop down as a Training Services NSW requirement. Only required where the Apprentice/Trainee Code is Apprentice or Trainee.

Note, there is no validation via EP that the options alongside align with the Apprentice/Trainee Code. Invalid combinations will be rejected by Training Services NSW.

There is a new checkbox for **Social Housing/Waitlist**. This is a required field for the STS Input file, and is used to drive eligibility for Smart & Skilled Scholarships where the cap of 50,000 places has been exceeded.

Save the Enrolment by selecting the **Save** button.
STS REGIONS EXPLAINED

1. What is a STS Region?

- In the Smart & Skilled Application, providers indicate their willingness and capacity to deliver a qualification in one or more of 15 regions. Regions are based on Australian Bureau of Statistics (ABS) statistical areas.
- Postcodes are mapped to Regions. At the SA3 and SA2 levels (sub regions), some postcodes may be split across regions. Where this is the case, these postcodes are mapped to multiple regions in ebs.
- A list of regions and their associated postcodes is available from the STS website.
- State Training Services determine which qualifications and part qualifications it will allocate to a RTO for provision under the Smart and Skilled contract.
- The RTO is notified of this allocation by the issue of one or more Approved Qualification Activity Schedules for Smart and Skilled programs. This sets out which qualifications an RTO may deliver during an Activity Period, against which program streams, regions, and delivery modes, and the financial caps per region.

2. What is the Region used for?

- RTO’s are required to notify STS of all enrolments into Smart & Skilled subsidised training using the Provider Calculator on STS Online (except for School Based Apprentices and Trainees). One of the requirements in the data specification is to report the STS Region code.
- Reported regions are validated by STS against the Activity Schedule for the purpose of monitoring contract compliance. In addition, financial caps are monitored per region. Financial caps are the maximum amount of standard subsidies that an RTO may be entitled to in an activity period for approved qualifications.

3. How is a region assigned in ebs?

A region is assigned by the system after enrolment is saved in two ways depending on the course delivery mode assigned against the Offering.

There are 4 course delivery modes as defined by STS. When a Smart & Skilled Offering is created, a course delivery mode needs to be setup by Institute staff based on the Activity Schedule.

1. If a learner enrols in a qualification that is delivered via Classroom (10) or Mixed Mode (40) or Work Based (30), the region will be assigned to the enrolment based on the enrolment location postcode of the qualification.

   In some cases, the system may not be able to assign a region, and it will need to be manually added. Possible scenarios:
   - Where a nominated area postcode (on the border) belongs to multiple regions.
   - Where the enrolment location postcode has no associated region

2. If a learner enrols in a qualification that is delivered via Online/correspondence (20), the region is assigned based on the learner’s home or work postcode.

   If a learner lives in NSW, their home postcode will be used to identify a region.
   If a learner does not live in NSW but works in NSW, their employer’s work postcode will be used.
   If a postcode lookup returns multiple regions, no region will be assigned, and it will need to be manually added by a user with the Enrolment Super User group role.
   If a postcode lookup returns no region, it will need to be manually added. Possible scenarios:
   - Where a nominated area postcode (on the border) belongs to multiple regions.
   - Where the home/work postcode has no associated region

Note, a Region is only assigned after an enrolment is first saved. If the learner postcode is subsequently changed, the region is not automatically re-assessed, and may need to be manually changed.
1. Contracted program streams are maintained in reference data to reflect the Institute’s Activity Schedule. This is performed by users with the Activity/Skills List role each time there is an update to the Skills List.

2. Once an enrolment is saved, the system will attempt to assign a Program Stream based on the Program Streams that are active on the current version of the Institute’s Activity Schedule. The logic used in the backend is based on simple elimination of available options, i.e.
   a) If a learner is enrolling as an Apprentice, and Program Stream 4 exists on the Activity Schedule, 4-Entitlement A&T (Apprenticeship) will be assigned against the enrolment.
   b) If a learner is enrolling as a Trainee, and Program Stream 3 exists on the Activity Schedule, 3-Entitlement A&T (Traineeship) will be assigned against the enrolment.
   c) If a learner is not enrolling as an Apprentice or Trainee, and only one other Program Stream is available on the Activity Schedule, that Program Stream will be assigned.

3. Where a Program Stream cannot be assigned, it will be left blank, and will need to be entered manually by a user with the Enrolment Super User group role. A progress code of 4.4 TPS Program Stream Intervention Required will be assigned to the enrolment.

4. Note that a fee is not assigned unless a Program Stream has been determined. Only after the Program Stream is entered, and the Fee Calculator button is clicked, will the fee be assigned.

5. Note where a Commercial fee type is assigned against a Smart & Skilled Offering; and a learner is found to be ineligible, a Program Stream will be assigned. This is targeted for resolution in phase 3. Exception reports need to be used to identify learners enrolled in Smart & Skilled Offerings on a COMM/FFS fee.

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**PROGRAM STREAM EXPLAINED**

1. **What is a Program Stream?**

   The Approved Qualification Activity Schedule sets out which qualifications a RTO may deliver during an Activity Period, against which program streams, regions, and delivery modes, and the financial caps per region.

   Qualifications on the NSW Skills List fall into the following program streams:
   1. Entitlement Foundation Skills - Certificate I and II
   2. Entitlement Full Qualification - Certificate II and III
   3. Entitlement A&T (Traineeship)
   4. Entitlement A&T (Apprenticeship)
   5. Targeted Priorities Full Qualification - certificate IV, diploma, and advanced diploma

   Other Program Streams required for reporting will be derived using existing processes.

2. **What is the Program Stream used for?**

   • A Program Stream is assigned against each learner’s enrolment where the Offering Type is Smart & Skilled VET FEE HELP or Smart & Skilled non VET FEE HELP.
   • Program Stream is a mandatory data field required for the STS file export/import process. Reported program streams are validated by STS against the Activity Schedule for the purpose of monitoring contract compliance.
   • Program Stream is a pre-requisite for invoking the Fee Calculator.
   • Program Streams may also be used by TAFE to track various student cohorts

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**3. How is a Program Stream assigned in ebs?**

1. Contracted program streams are maintained in reference data to reflect the Institute’s Activity Schedule. This is performed by users with the Activity/Skills List role each time there is an update to the Skills List.

   ![STS Skills List (read only)](image1)
   ![Institute’s Activity Schedule](image2)

   STS Skills List (read only) and Institute’s Activity Schedule are used to assign Program Streams.

2. Once an enrolment is saved, the system will attempt to assign a Program Stream based on the Program Streams that are active on the current version of the Institute’s Activity Schedule. The logic used in the backend is based on simple elimination of available options, i.e.
   a) If a learner is enrolling as an Apprentice, and Program Stream 4 exists on the Activity Schedule, 4-Entitlement A&T (Apprenticeship) will be assigned against the enrolment.
   b) If a learner is enrolling as a Trainee, and Program Stream 3 exists on the Activity Schedule, 3-Entitlement A&T (Traineeship) will be assigned against the enrolment.
   c) If a learner is not enrolling as an Apprentice or Trainee, and only one other Program Stream is available on the Activity Schedule, that Program Stream will be assigned.

3. Where a Program Stream cannot be assigned, it will be left blank, and will need to be entered manually by a user with the Enrolment Super User group role. A progress code of 4.4 TPS Program Stream Intervention Required will be assigned to the enrolment.

4. Note that a fee is not assigned unless a Program Stream has been determined. Only after the Program Stream is entered, and the Fee Calculator button is clicked, will the fee be assigned.

5. Note where a Commercial fee type is assigned against a Smart & Skilled Offering; and a learner is found to be ineligible, a Program Stream will be assigned. This is targeted for resolution in phase 3. Exception reports need to be used to identify learners enrolled in Smart & Skilled Offerings on a COMM/FFS fee.
HOW THE FEE IS ASSIGNED (STAFF ASSISTED ENROLMENT)
REFER TO QRG MANAGING FEES AGAINST THE LEARNER FOR FURTHER DETAILS

Automated steps are highlighted in blue

1. Create / select existing learner record
2. Add enrolment & save
3. Check eligibility
   - Eligible
     - Send Information to Fee Calculator
     - Check if a matching fee type has been setup against the Offering
     - Assign fee type against the enrolment on the Payments tab
     - Calculate Fee
   - Not eligible
     - Commercial Fee is assigned or error message is displayed
4. Obtain returned Centrelink values and click the Fee Calculator button
   - Yes
     - Apply for concession or exemption?
       - No
         - Proceed to payment options
       - Yes
         - Proceed to payment options

Note, where any changes are required to an enrolment after it has been saved; a user will need to manually invoke the “Fee Calculator” button in order that eligibility is assessed and a fee can be assigned.

The Fee Calculator calculates the fee using the Smart & Skilled Fee List which is loaded on each occasion that there is an update (note there is no interface with STS). The Fee Calculator returns:

- Eligibility (true/false)
- Fee value
- Subsidy type

The subsidy types returned can be:
- apprenticeship
- traineeship
- second
- first
- concession
- exemption
STAFF ASSISTED – DISABILITY CONCESSION OR EXEMPTION

Learner Declaration

Yes, I have a disability

Centrelink, I receive a Disability Support Pension

I am a dependent child/spouse/partner of a person on a Disability Support Pension (DSP)

1st or 2nd Qual fee is applied. Note, no waivers have been assigned at this stage.

Ensure the Welfare Status of the learner has been entered appropriately in the Employment/STS area

Staff action required

Enter learner’s CRN (primary card holder) and validate through the Centrelink interface

Validate manually

Validate manually

If disability is validated

• Disability waiver code DSP1 is attached to the enrolment
• Learner receives the exemption fee

• Manually add the disability waiver code DSA1 to the enrolment and click the Fee Calculator button.
• Check the exemption fee is applied (note the fee type will not change, only the dollar value will reduce).

• Manually add the disability waiver code (DCH1/ DPA1) to the enrolment and click the Fee Calculator button.
• Check the exemption fee is applied (note the fee type will not change, only the dollar value will reduce).

If disability is NOT validated

Where a learner has a disability that does not qualify for a concession or exemption under Smart & Skilled, the learner record will need to be updated so that disability status is No Disability. This is required so that the enrolment does not appear again in the disability audit report.
RECONCILE – DISABILITY CONCESSION OR EXEMPTION

Use the Declared Disability Report in the Reports Cradle (Enrolments folder) to identify enrolments where learners have a declared disability. The report can be used to track enrolments where a learner has a declared disability that has not been verified. These enrolments can be identified because there is no disability exemption waiver attached. In addition, the report can be used to identify where a disability exemption waiver has been applied, but there is no declared disability. This report can be used to identify students that have declared they have a disability.

NOTE: The report output (last 8 columns) also provides the data required to undertake a fee comparison of the Student Fee and the Actual Fee charged.

<table>
<thead>
<tr>
<th>Student Fee</th>
<th>Subsidy Amount</th>
<th>Standard Subsidy</th>
<th>Needs Loading</th>
<th>Location Loading</th>
<th>Fee Type</th>
<th>Standard Fee</th>
<th>Actual Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,000.00</td>
<td>$4,640.00</td>
<td>$4,640.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>SSTRA</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>$1,000.00</td>
<td>$4,640.00</td>
<td>$4,640.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>SSFIR</td>
<td>$1,960.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>$0.00</td>
<td>$6,140.00</td>
<td>$3,850.00</td>
<td>$921.00</td>
<td>$0.00</td>
<td>SSEXM</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>$0.00</td>
<td>$6,140.00</td>
<td>$3,850.00</td>
<td>$921.00</td>
<td>$0.00</td>
<td>SSFIR</td>
<td>$1,960.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
Note the new Smart & Skilled values that have been added to Condition Builder in Learner Manager, Enrolments grid:

- Commitment ID
- Commitment Date
- Commitment Expiry Date
- Reason for Rejection
- USI Number
- USI Verified
- Rehabilitation for Disability
- Evidence for Rehabilitation
- STS Region
- Program Stream
- Another SS Qualification
- Welfare Status
- Employer Name
- Employer Suburb
- Employer Postcode
- Social Housing/Waitlist
- LTU Evidence
- STS Export Date
- STS Status
- Subsidised Amount
- Standard Subsidy
- Needs Loading
- Location Loading
## NEW SMART & SKILLED SPECIFIC PROGRESS CODES

### Progress Codes for Applications

<table>
<thead>
<tr>
<th>Progress Code</th>
<th>Title</th>
<th>Progress Status</th>
<th>Description</th>
<th>Automatic workflow attached to the Progress Code</th>
<th>Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.13 ATPS</td>
<td>App Program Steam Intervention Req</td>
<td>N</td>
<td>No Program Stream has been assigned to an application and requires manual investigation.</td>
<td>Set by workflow when an application is saved, and no Program Stream can be assigned</td>
<td>Users will need to check whether the application is valid before manually assigning a valid Program Stream for which the Institute has contract to deliver. If the course setup is correct, this Progress Code usually indicates that an application is invalid, and an alternative Offering should be provided to the learner.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>A Program Stream will not be assigned if</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• the qualification is not Active on the Activity Schedule, or</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• there is more than one Program Stream in the Activity Schedule and the applicable one cannot be determined.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• A learner has enrolled online as an Apprentice, and no Apprentice Program Stream is available (the same applies to Trainee Program Stream)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• A learner has not enrolled as an Apprentice into an Apprentice-only course.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0.74 TFCERR</td>
<td>Ineligible for Smart &amp; Skilled</td>
<td>W</td>
<td>The created application is not eligible for Smart &amp; Skilled and the application has been withdrawn. Applications in this status cannot be converted to an enrolment.</td>
<td>Set by workflow when an application is saved, and a learner is found to be ineligible.</td>
<td>Alternative Offerings will need to be discussed with the learner</td>
</tr>
</tbody>
</table>
## NEW SMART & SKILLED SPECIFIC PROGRESS CODES FOR ENROLMENTS

<table>
<thead>
<tr>
<th>Progress Code</th>
<th>Title</th>
<th>Progress Status</th>
<th>Description</th>
<th>Automatic workflow attached to the Progress Code</th>
<th>Next Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4.4 TPS</strong></td>
<td>Enrol Program Steam Intervention Required</td>
<td>N</td>
<td>No Program Stream has been assigned to an enrolment after enrolment Save and requires manual investigation. A Program Stream will not be assigned if the qualification is not Active on the Activity Schedule, or the applicable one cannot be determined. It also applies where a learner has enrolled online as an Apprentice, and no Apprentice Program Stream is available (the same applies to Trainee Program Stream), OR…. A learner has not enrolled as an Apprentice into an Apprentice-only course.</td>
<td>Set by workflow when an enrolment is saved, and no Program Stream can be assigned.</td>
<td>Users will need to check whether the enrolment is valid before manually assigning a valid Program Stream for which the Institute has contract to deliver. Manually assign a valid Program Stream (for which the Institute has contract to deliver), save the enrolment and manually click the Fee Calculator button to retrieve the fee.</td>
</tr>
<tr>
<td><strong>0.71 TFCMAN</strong></td>
<td>TFC Manual Intervention Required</td>
<td>N</td>
<td>The Fee Calculator experienced a technical failure while getting the fee for the N-Non Starter enrolment</td>
<td>Set by workflow when an enrolment is saved, and connection to the Fee Calculator is unavailable.</td>
<td>Manually click the Fee Calculator button to retrieve a fee. If it is still unavailable, manually attach the correct fee using the Add Fee button, manually change the Progress Code to 1.0 Unpaid, and manually assign the correct Region.</td>
</tr>
<tr>
<td><strong>0.72 TFCERR</strong></td>
<td>TFC Fee Missing from Offering</td>
<td>N</td>
<td>The Fee Calculator could not assign a fee to the enrolment due to a missing fee type against the Offering.</td>
<td>Set by workflow when an enrolment is saved, and no matching fee type can be assigned.</td>
<td>Ensure that the Offering is setup with the correct fees or where the Institute is not contracted to deliver a particular program stream and hence the fee is not setup, discuss alternative offerings with the learner.</td>
</tr>
<tr>
<td><strong>0.73 INELIG</strong></td>
<td>Ineligible for Smart &amp; Skilled</td>
<td>N</td>
<td>The created enrolment is not eligible for Smart &amp; Skilled. No Commercial Fee was available on the Offering.</td>
<td>Set by workflow when an enrolment is saved, and a learner is found to be ineligible.</td>
<td>Alternative Offerings will need to be discussed with the learner before the enrolment can be progressed.</td>
</tr>
<tr>
<td><strong>1.91 TFCMAN</strong></td>
<td>TFC Manual Intervention Required</td>
<td>A</td>
<td>The Fee Calculator experienced a technical failure when getting a fee for an (A-Active) enrolment.</td>
<td>Set by workflow when an enrolment is saved, and connection to the Fee Calculator is unavailable.</td>
<td>Manually click the Fee Calculator button to retrieve a fee</td>
</tr>
<tr>
<td><strong>1.92 TFCERR</strong></td>
<td>TFC Fee Missing from Offering</td>
<td>A</td>
<td>The Fee Calculator could not assign a fee to the (A-Active) enrolment due to a missing fee type against the Offering.</td>
<td>Set by workflow when an enrolment is saved, and no matching fee type can be assigned.</td>
<td>Ensure that the Offering is setup with the correct fees or where the institute is not contracted to deliver a particular program stream and hence the fee is not setup, discuss alternative offerings with the learner.</td>
</tr>
</tbody>
</table>
**APPENDIX 1 HOW TO ADD AN SRN AND A DEC USER ID**

Before creating a new learner record in Client, always check if a learner record already exists in your instance of ebs by performing a Learner Search.

Once a new learner record has been created in Client and before adding the enrolment, follow these steps to assign a SRN (Learner Number):

1. Select the Learner Number button on the Learner ribbon. The Learner Number Search window will open.
2. Click on Search
3. The results of the SRN search will appear on the Learner Number Results grid. This grid will display results based on a search of the existing ebs instance plus other Institutes instances of ebs
4. To view the details of a particular learner record, click on a row in the grid, and the details will display in the panel below (From Other Institutes).
5. Where a match is found, highlight the row and click Update ebs.

Note that where a match is found for a learner within the existing instance of ebs, the following error message will display.

In this scenario a duplicate learner record exists, and the enrolment should be added to the learner record that already has a Learner Number.

A hot note should be added to the duplicate record as per Manage Duplicate Records QRG
**APPENDIX 1  How to add an SRN and a DEC User ID**

1. To create a DEC User ID:
   - Click the **Account management** button on the Learner Ribbon.
   - A Learner Account Manager window will open
   - Click **Create DEC User ID**.
   - Once generated it will display USER ID and the temporary password to provide/advise to the learner. Record the details before clicking **Close**.

2. If a SRN does not already exist, click **Allocate Learner Number** on top ribbon.

3. A window will pop up to confirm that a new Learner Number will be allocated. Click **Yes**.

4. A pop up will appear confirming that a SRN has been successfully allocated.

5. The SRN will appear on the Learner Record in Learner Details.

**Summary: When do I have to create a SRN and a DEC User ID?**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>SRN</th>
<th>DEC User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner signs in when they access the Enrolment Portal</td>
<td>No- auto created</td>
<td>No- auto created</td>
</tr>
<tr>
<td>Learner enrols through enrolment portal but does not sign in</td>
<td>Yes- assign SRN</td>
<td>No- auto created</td>
</tr>
<tr>
<td>Learner enrolled through Client</td>
<td>Yes, assign SRN</td>
<td>Yes- create User ID</td>
</tr>
</tbody>
</table>