
Fee Protect

Website User Guide

www.feeprotect.co.nz



Contact the Fee Protect team at Public Trust

General enquiries

feeprotect@publictrust.co.nz

If it is urgent then call us on 0800 494 733, 8am – 5pm weekdays.

Student acknowledgement forms

feeprotectapplications@publictrust.co.nz

Limit of two forms per PDF and 10 attachments per email. Please don't fax or post.

Student refund forms

feeprotect@publictrust.co.nz

Student milestone payment forms

feeprotect@publictrust.co.nz

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www.feeprotect.co.nz

Tip: you can save time scrolling and simply use links in the contents page to click the section you want to go to for easy access.

Introduction

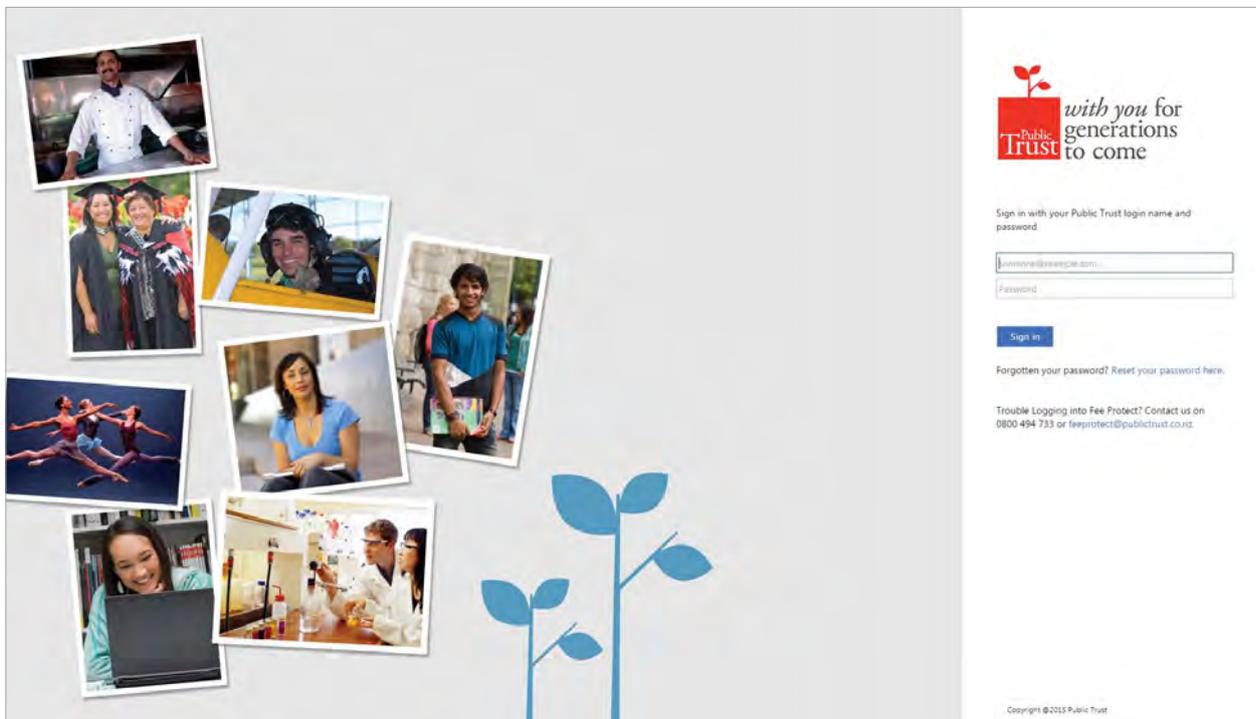
Purpose of this document

This document has been created to help Users of the Fee Protect website with the most common and frequently used processes and procedures. Please be aware this is only a guide and doesn't cover all processes and procedures, for further support please contact us on 0800 494 733 between 8:00am – 5:00pm weekdays.

Getting started

Fee Protect is an online system, go to www.feeprotect.co.nz to access the site. While you're there add it to your list of 'favourites' for quick and easy access.

Below is the home page



If you're a registered User, get started by clicking 'Log in to Fee Protect', this will take you to the below screen. Enter your unique Public Trust login name and password and click 'Sign in' to enter the system.

Reset your password

If you've forgotten your password, click 'Reset your password here' and input your Public Trust login name.

Select 'Submit' once you've entered your Public Trust login name.

After clicking 'Submit' you'll be sent an email to reset your password. Please check your junk mailbox if you haven't received an email within five minutes.

Select 'Use this link to access the change password page' which will bring you to the below screen. You'll need to confirm your identity by answering your security question.

Enter your answer.

Click 'Submit Answer' to access the next screen and reset your password. Enter a new password and then select 'Change Password'

Trust Fee Protect

Reset Password

You can reset your Fee Protect password here.

Your Email Address

Your Email Address

james@morrisvalley.co.nz

This Email Address is your login name.

Password

Your New Password

Confirm Your New Password

Your password must be at least 7 characters in length and is case sensitive so enter it correctly.
Create a strong password that can't be easily guessed or cracked. You can include any of the following:

- Lowercase letters
- Uppercase letters
- Numbers (0-9)
- Symbols, including: !@#\$%^&*._-+=(){}|~\|/;'":< > ,

Change Password

Enter a new password.

Select 'Change Password' to reset your password.

Once your password has been reset, you'll be redirected to a confirmation screen.

Click 'Login to Fee Protect' to be redirected to the login page where you can use your new password.

You'll be allowed three attempts to log in, after the third failed attempt, your account will be frozen and will need to be reactivated by your Super User. Alternatively, if your Super User is unavailable you can contact the Fee Protect team.

Trust Fee Protect

Password Reset Complete

You password has successfully been changed
Please click the button to login with your new password.

Login to Fee Protect

When you enter the system you'll be taken to your Provider's 'homepage' which looks like this...

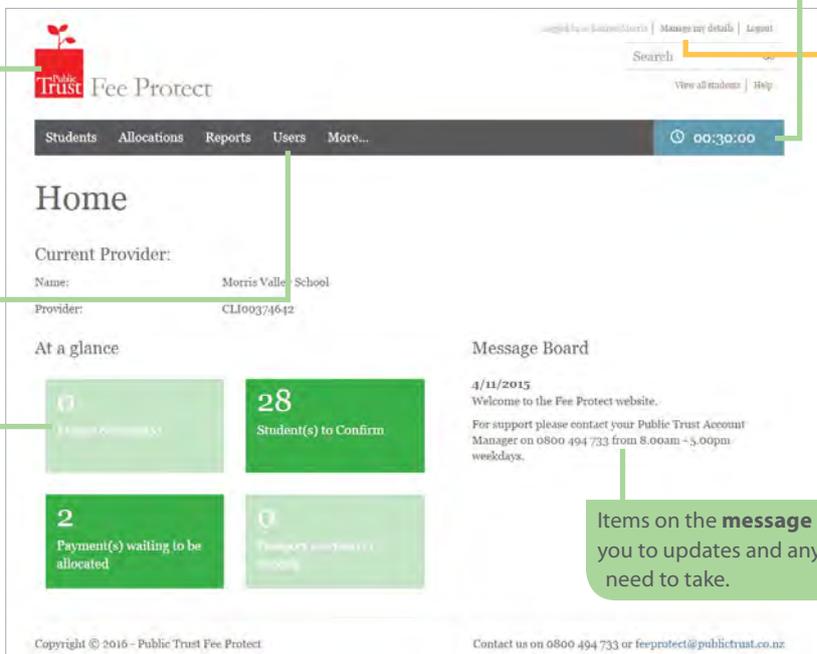
The system will automatically log you off after **30 minutes inactivity**. This clock shows the time remaining before this will happen. You'll then be prompted to re-enter your online ID and password.

Clicking on the **Public Trust logo** will always bring you back to your homepage.

The **'Users'** tab will only appear for Super Users.

Tiles on the **'At a glance'** dashboard alert you to actions you need to take. Click on the tile to begin the action.

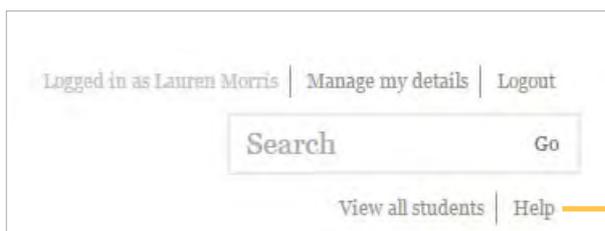
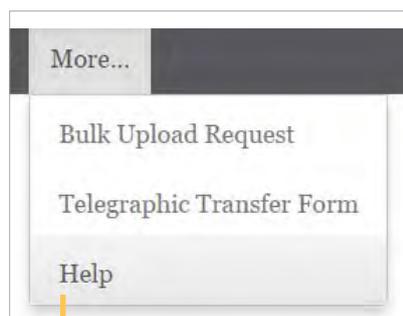
Select **'Manage my details'** to edit your details, such as changing your password or security question.



Items on the **message board** alert you to updates and any actions you need to take.

Support and assistance

You'll be able to view the latest versions of the Fee Protect User Guide, website FAQs and our contact information by clicking on either the 'Help' button at the top right corner of the screen, or selecting 'Help' from the 'More...' tab. These options are visible from all screens. The support page will load in a new browser window, where you can print off any documentation.

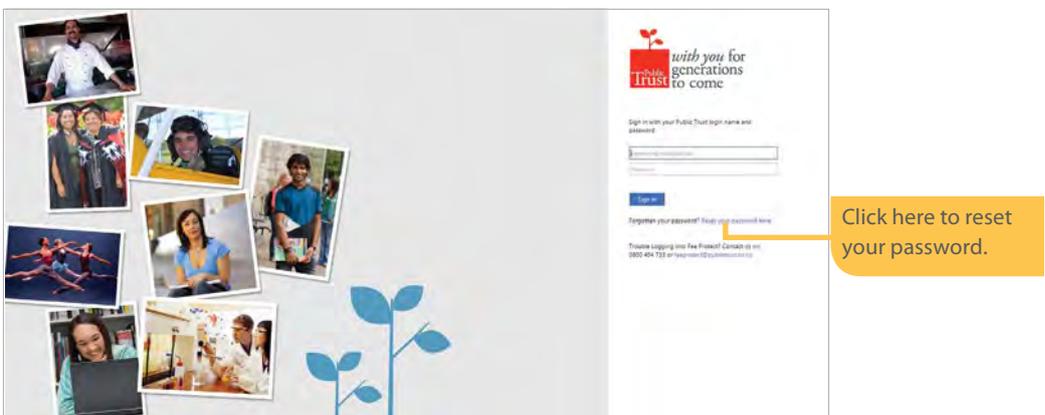


Click here to access support documentation.

Change your password

This option allows you to change your password at any time, using the steps outlined previously. All Users have the ability to reset their own password if they've forgotten it. This can be done by clicking "Reset your password here" from the login screen.

After the 15th of each month, all Users will receive a prompt requiring them to change their password, this is mandatory for security reasons.



Manage User accounts (Super User only)

The "Users" option on the ribbon of your homepage is only available to Super Users to manage their Provider's Admin Users.

This option can be used to:

- Lock or unlock Admin Users accounts where there have been three failed log in attempts.
- Delete Admin Users from the system e.g. when a staff member leaves.
- Force a password change for Admin Users (you may wish to do this if you believe an unauthorised person has used this account).
- Add a new Admin User and resend invitation links.

The image shows the 'User Search' page in the Morris Trust system. The page has a search bar, a status dropdown menu set to 'Active', and a table of users. Annotations include:

- A yellow callout pointing to the 'Add New' button: 'Click here to add a new Admin User.'
- A yellow callout pointing to the search bar: 'Tick the box next to the User Name to select a specific User(s). To select all Users click the tick box at the top of the table.'
- A yellow callout pointing to a user row: 'Click on a specific User to update their details, force a password reset and to unlock the User.'
- A yellow callout pointing to the action icons in a row: 'Once a User(s) is selected, the action arrow will be available. This arrow allows you to lock or delete the selected User(s).'
- A green callout box on the right lists user statuses:
 - You can search for specific Users:**
 - Active** Current Users for your Provider.
 - All** Shows all Users for your Provider.
 - Locked** Users with locked accounts.
 - Invited** New Users that have yet to be set up in the website.

Add Admin User (Super User only)

The “Add New” button on the “Users” is only available to Super Users.

Once selecting the “Add New” button, you’ll be taken to the “Create User” screen.

This email address will be the new User’s login name.

Make sure this is an email address that is unique to that User, not a shared email address.

The screenshot shows the 'Create User' page in the Fee Protect application. At the top, there is a navigation bar with 'Students', 'Allocations', 'Reports', 'Users', and 'More...'. Below this is a search bar and a clock showing '00:29:54'. The main heading is 'Create User'. Below the heading, there is a brief instruction: 'You can add a new user here. When you press Add User, the user will receive an email asking them to complete the new user process.' The form contains several input fields: 'Email Address*' (with a red asterisk), 'Confirm Email Address*', 'User Name', 'Office Location', 'Work Phone Number', and 'Mobile Phone Number'. A blue 'Add User' button is located at the bottom left. A yellow callout box with a red arrow points to the 'Email Address*' field, containing the text 'Fill in all mandatory fields, marked with a (*)'.

When you’re ready to proceed click the ‘Add User’ button. You’ll be redirected to the below screen which indicates an invitation email has been sent to the new User.

The screenshot shows the 'Update User' page in the Fee Protect application. At the top, there is a navigation bar with 'Students', 'Allocations', 'Reports', 'Users', and 'More...'. Below this is a search bar and a clock showing '00:29:40'. The main heading is 'Update User'. Below the heading, there is a brief instruction: 'Use this page to manage and maintain a user's details.' The form displays the details for a user named James Morris. The fields are: 'Email Address*' (james@morrisvalley.co.nz), 'User Name*' (James Morris), 'Office Location' (Wellington), 'Work Phone Number*' (04 987 6543), and 'Mobile Phone Number'. At the bottom, there is a 'Contact Preference' section with radio buttons for 'Phone' and 'Email'.

The new User will receive an email asking them to access Fee Protect to finish getting set up.



Note: Invitation email links can only be used once and will expire, as stated in the email. If the link has expired, a Super User can resend the invite from the Users tab.

Clicking "Use this link to join Fee Protect" from the email will direct the User to the below screen.

The screenshot shows the 'Fee Protect User Setup' page. It includes sections for 'What do I have to do?', 'Your login details', 'Your password', 'Your secret question and answer', and 'Contact Details'. Callouts provide additional information: a green box explains the 'What do I have to do?' section; another green box explains the 'User Name' field; an orange box explains that fields with an asterisk are mandatory; a third green box explains the 'Your secret question and answer' section; and a fourth orange box points to the 'Finish and Submit' button.

What do I have to do?
You would have received an email from the Fee Protect team, with a link directing you to this page.
From here you need to:
1. Confirm your email address is correct.
2. Create and confirm a new password.
3. Complete the additional information we need.
If your username/email isn't your preferred one, please contact us before you complete the details on this page.

Your login details
Fields marked with a * must be completed.
Email Address: james@morrisvalley.co.nz
Your Email Address is your login name and preferred email address for correspondence and notifications from Fee Protect. You must contact the Fee Protect team if you want this changed.
User Name*: James Morris
Your User Name is used to identify anyone you talk to on the Fee Protect website. It should be your First and Last names (e.g. James Smith).

Your password
Password*: *****
Password confirmation*: *****
Your password must be at least 8 characters in length and at least 3 characters by each of the following:
- Uppercase letters
- Lowercase letters
- Numbers 0-9
- Symbols, including: ! @ # \$ % ^ & * _ + = { } | : ; ' " < > ()
Create a strong password that can't be easily guessed or cracked. You can get help with this.

Your secret question and answer
We may need to confirm who you are one day, so we'll ask you for an answer to your secret question. Keep it something unique to you, but also something easy to remember - like the city you were born in.
Secret Question*: |
Secret Answer*: |

Contact Details
Office Location: Wellington
Work Phone*: 04 987 6542
Mobile Phone: |
Contact Preference: Phone Email
Finish and Submit

Callouts:
- Green box: This section provides guided information on how to fill out this screen.
- Green box: The User Name is used to identify actions the User takes in the Fee Protect website. It should be the User's First and Last names i.e. James Morris.
- Orange box: All fields marked with a (*) are mandatory fields.
- Green box: This question will be asked if the User has forgotten their password. The answer needs to be recorded as well.
- Orange box: Once completed, select "Finish and Submit".

Once the form is submitted, the new User will see a confirmation screen and will be able to log in using their email address and password to the Fee Protect website by clicking on the "Log in to Fee Protect" button.

The screenshot shows the 'New User Created' confirmation screen. It includes the Fee Protect logo, a 'Thank you' message, and a 'Log in to Fee Protect' button.

New User Created
Thank you - your user account has been successfully created.
Please click the button below to login with your new password.
Log in to Fee Protect

Using the Fee Protect website

Adding student details

Click the 'Students' tab, this will take you to the 'Student Search' screen.

Click the 'Add New' button and you'll be able to enter all the required details relating to a student:

The screenshot shows the 'Add Student' form in the Fee Protect system. The form is divided into several sections: 'Student Details', 'International Student', 'Course Details', and 'Notes'. The 'Student Details' section includes fields for 'Student Name*', 'Public Trust ID*' (with value CL100374642), 'Provider Student ID', 'Date of Birth - Age: *' (with format dd/mm/yyyy), and 'Gender*' (with 'Not Selected' selected). The 'International Student' section includes a checkbox for 'International' (with 'Yes this is an international student' selected), a 'Passport Number' field, and a checkbox for 'Student Loan' (with 'Yes this student has a Student Loan' selected). The 'Course Details' section includes 'Course Name*', 'Start Date*' (with format dd/mm/yyyy), 'End Date*' (with format dd/mm/yyyy), and 'Course Length*' (with format 'Weeks, inclusive'). A 'Notes' text area is at the bottom. The form has a navigation bar at the top with 'Students', 'Allocations', 'Reports', 'Users', and 'More...'. A search bar and 'Go' button are in the top right. A timer shows '00:29:49'. Several yellow callout boxes provide instructions: one points to the 'Student Name' field, another to the 'Date of Birth' and 'Gender' fields, a third to the 'Course Name' field, a fourth to the 'End Date' field, and a fifth to the 'Notes' field. A legend box states 'All fields marked with a (*) are mandatory fields.'

Enter the student name in the form as it should appear on the acknowledgement form (usually first name, family name).

Enter your usual name, code or abbreviation for the course the student is taking. Please note there's a 50 character limit for course names).

All fields marked with a (*) are mandatory fields.

The course end date is automatically calculated once you have entered the start date and length of course in weeks.

Enter any notes specific to the student.

Fee Breakdown

Total Fees Expected Assist Use this to record the total fees you expect. This will help you balance the individual fees listed below. **\$ 0.00**

Fee Breakdown	Amount (\$NZD)	Start Date	Duration (Weeks)	Frequency
Tuition Fees and Course Related Costs	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Health / Travel Insurance	<input type="text"/>			
Accommodation	<input type="text"/>	<input type="text"/>	<input type="text"/>	Per Schedule <input type="text"/>
Living Expenses	<input type="text"/>	<input type="text"/>	<input type="text"/>	Per Schedule <input type="text"/>
Total Fees	<input type="text"/>			
Non Tuition Costs	<input type="text"/>			

Save Changes and Process Save and Edit Exit and Don't Save

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Total Fees must equal the Fee Breakdown sum.

Use the Total Fees Expected Assist to help ensure you enter the fees correctly.

Select from the drop down box for living and accommodation fees. Four Weeks Immediate means four weeks payable immediately. Per Schedule (default) means the full amount to be paid as per the number of weeks on payment schedule.

There are three options to finalise this process:

- "Save Changes and Process" will add this student and bring you back to a blank "Add New" student page.
- "Save and Edit" will add this student, and bring you back to the student details screen.
- "Exit and Don't Save" will cancel the process, and not add the student.

Download the acknowledgment form

Once you have saved your changes and want to view, print or email the Student Acknowledgement Form you can either access it via:

- The 'Student Details' screen, click on the 'Actions' button where you will find various actions that can be carried out for that student or;
- Student Search screen by using the tickbox to the left of the students name and selecting the arrow on the table heading.

International students

The student passport number, whilst not mandatory when adding a student, is required for International students before Public Trust will authorise payments to your Provider.



Note: A domestic student is defined as any student entitled to the Government tuition subsidy, including:

- citizens of New Zealand (including students from the Cook Islands, Tokelau, or Niue who have New Zealand citizenship).
- a permanent resident of New Zealand.
- a citizen or permanent resident of Australia residing in New Zealand.

For example: Julian may hold a South African passport, but is a permanent resident of New Zealand. Within the Fee Protect website, Julian is classed as a domestic student.

The “Student loan” and “International student” tick boxes are linked. If you select the student’s citizenship as New Zealand/Permanent Resident the “International Student” tick box will automatically be greyed out indicating a “No” and is no longer an editable field. The “Student loan” tick box will be available to be selected.

As the citizenship selected is “Argentina” the “International Student” tick box is automatically selected and greyed out, indicating this field cannot be edited.

The “Student Loan” tick box is automatically unselected, greyed out and not able to be edited.

To be able to produce an accurate Ministry of Education (MoE) Export Levy report from the data held in Fee Protect, you should record the tuition related costs that would be excluded from the levy calculation in the “Non Tuition Costs” field (shown below). This would include; administration fees, exam fees, books, student services and compulsory course costs for equipment, field trips, etc.

If the correct data is entered into this new field the Fee Protect MoE Export Levy report can be used to calculate your levy amount. Note: you’ll need to use this field for a whole financial quarter prior to running the report to be sure that the data used in the calculation is correct.

The total tuition fee and course related costs should be recorded in the normal way in the “Tuition fees and course related costs” field. This is the total amount that NZQA requires to be protected on behalf of the student (defined by NZQA as “Tuition fees”).

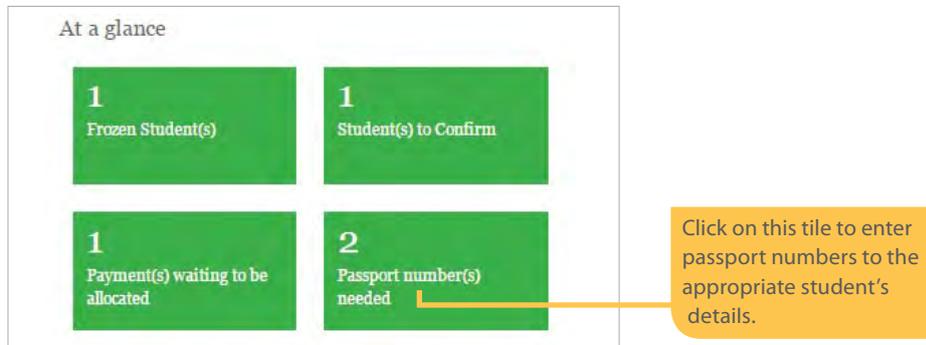
Questions about the Education Export Levy and which fees are included or excluded should be directed to the Ministry of Education international.division@education.govt.nz.

If you don’t have international students or don’t wish to use the Education Export Levy report, please ignore this field and enter the full Tuition fee in the usual field.

International student passport numbers

Passport numbers for international students are not required to be entered when a student record is being created, but are required for the student to be authorised.

A reminder to supply any outstanding passport numbers will be displayed on the 'At a glance' dashboard on your homepage. You can click on the tile to be taken to the student search screen, filtered by students needing passport numbers.



Uploads from Student Management Systems

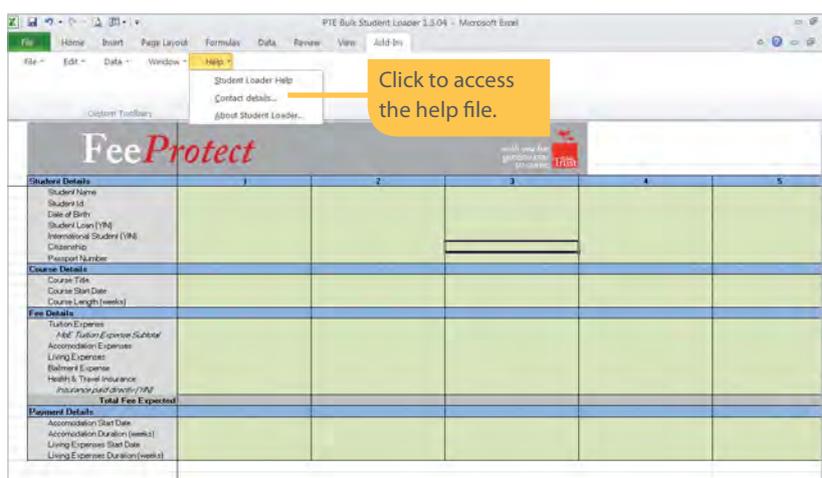
If your Provider uses Take2, ENROLpro or Artena student management software, you may be able to upload student details direct to Public Trust. Please ask your software supplier for more details.

Bulk student loader

We also have available, a bulk student loader spreadsheet that operates under Microsoft Excel, which enables you to upload student details for multiple students. This can be requested from the 'More...' tab, which will bring you to a screen providing more information on the bulk student loader.

Once downloaded, the bulk student loader spreadsheet has a help file explaining clearly how to use it.

After the student details have been successfully uploaded, you can request the appropriate student acknowledgement form via a link within the confirmation of upload email.



Note: To display a list of the uploaded students from a single upload. You can sort by PT Reference number (in descending order) which will show the most recently added students.

Delete a student

You may wish to delete a student if you've set them up by mistake or they've withdrawn from a course.

Deletions can be made through the 'Student Details' screen **provided you have not already allocated fees** received to the student.

To delete a student record:

Select the 'Students' tab, which will take you to the 'Student Search' screen. Select the student to be deleted by clicking on the student's name.

Clicking on the student name will direct you to the Student Details screen.

<input type="checkbox"/>	Student	Provider	Status	Amount Expected
	PT Reference Number	Student ID		
<input type="checkbox"/>	Barry Johnson - Woodwork 149			
	P8031394		Confirmed	7,500.00

When you enter the 'Student Details' screen, click on the 'Actions' button where you will be able to access the 'Delete' button. When you 'click' on this button you will be asked to confirm that you wish to delete the student record and confirming the deletion will permanently delete the record.

Click to delete the student record.

The screenshot shows the 'Student Details' screen for Barry Johnson. A semi-transparent overlay menu is open, displaying several action buttons. The 'Delete Student' button is highlighted with a yellow callout box. Other buttons include 'Acknowledge', 'Payment Schedule', 'Refund', 'Extend Student', and 'Reversals'. At the bottom of the screen, there is a date field set to '05/01/1990', a dropdown menu set to 'Not Selected', and a checkbox labeled 'Yes this student has a Student Loan' which is checked. The 'Frozen Student' status is also visible at the bottom.



This function cannot be 'undone'. If you select and delete the wrong student record then the student details will have to be re-entered by 'adding a student' and the student will be given a new student reference number.

Search for a student record

Select the 'Students' tab, which will take you to the 'Student Search' screen. This screen will show the first page of a list of all students recorded for your Provider.

To make it easier to search for a student you can use the search boxes and column filters. You may enter details such as their name (or part of their name) or a reference number to locate the record for a particular student.

The screenshot shows the 'Student Search' page on the Public Trust Fee Protect website. The page includes a search bar, a dropdown menu for columns, and a 'Restricted To' dropdown menu. Below these is a table of student records with columns for Student Name, PT Reference Number, Provider Student ID, Status, Amount Expected, Received, Course Start, and End. Callout boxes provide instructions on how to use these features and explain the meaning of different account statuses.

To search for a particular student (or students) you may enter all (or part) of their name here, or any other data relating to a student – such as course name – and then click on the "Search" button.

Clicking on the student name will allow you to view the details for that student.

Select the column you wish to search from the drop down list.

Select the appropriate group of students to be included in the search.

This column shows the status of this student's account.

Incomplete
You need to send the signed student acknowledgement form to Public Trust who will authorise the record.

Authorised
Signed student acknowledgement form has been received and authorised by Public Trust.

Confirmed
Signed student acknowledgement form received and authorised by Public Trust and attendance is confirmed.

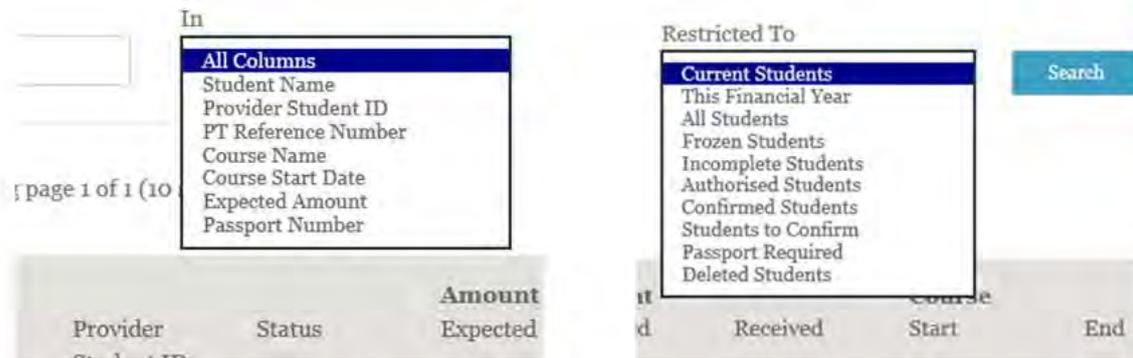
Frozen
The account has been frozen. No payments will be made until the issue has been resolved, this may be:

- At the student's request.
- At the Provider's request.
- Pending a refund.

To view the reason open the student record.

Student	PT Reference Number	Provider Student ID	Status	Amount Expected	Received	Course Start	End
Barry Johnson - Woodwork 149	P8031394		Confirmed				
Barry Johnson - Woodwork 149 - Extension From	E8031400		Incomplete				
Charlotte King - Cookery 245	P8030389		Confirmed				
Hayden Romala - Cookery 245	P8031399		Authorised				
Jane Hutt - English 100	P8030392	435421	Authorised				
Rebecca Williams - Dancing 101	P8031393		Incomplete				
Robert Grove - English 100	P8030391		Incomplete				

The following filters can be applied to your student database to find specific types of students:



Bulk Student Actions

From the 'Student Search' screen there are a number of actions that you can perform in bulk.

Select the 'Students' tab, to take you to the 'Student Search' screen. Select the specific student(s) by clicking on the tick box besides the student name. The action arrow button is now available to be selected.

Tick the box next to the User Name to select a specific student(s). Alternatively, select the tick box at the top of the table to select all students.

Once a student(s) is selected, the action arrow will be available. This arrow allows you to bulk download student acknowledgement forms, bulk confirm eligible students and view the student payment schedule for one student.

Student	Provider	Status	Amount Expected	Start	End
Barry Johnson - Woodwork 149	Woodwork 149	Confirmed	7,500.00	30/11/2015	26/02/2016
Barry Johnson - Woodwork 149 - Extension From P8031394	Woodwork 149	Incomplete	4,500.00	8/02/2016	18/03/2016
Charlotte King - Cookery 245	Cookery 245				

Actions on Student Details

For each student, there are a number of actions that can be carried out on the 'Student Details' screen, such as viewing a student's Acknowledgement Form or Payment Schedule.

Select the 'Students' tab, which will take you to the 'Student Search' screen. Select the specific student by clicking on the student's name.

Clicking on the student name will direct you to the 'Student Details' screen.

Student	Provider	Status	Amount Expected
Barry Johnson - Woodwork 149	Woodwork 149	Confirmed	7,500.00

When you enter the 'Student Details' screen, click on the 'Actions' button where you will find various actions that can be carried out for that student.

The screenshot shows the 'Student Details' page for Hayden Romain - P8031399. The 'Actions' menu is highlighted with several callout boxes:

- Click here to view and print the payment schedule for a student.** (Points to 'Payment Schedule')
- Click here to confirm the student's attendance. This option is only available once Public Trust has authorised the student.** (Points to 'Confirm Student')
- Click here to delete a student.** (Points to 'Delete Student')
- This option is only available if you have not allocated fees received to the student record.** (Points to 'Delete Student')
- Click here to download the student's transaction history.** (Points to 'Transaction History')
- Click here to perform a money allocation reversal.** (Points to 'Reversals')
- Click here for payments to be made via a credit card.** (Points to 'Credit Card Details')
- This option is only available if the student is in shortfall.** (Points to 'Extend Student')
- Click here to extend the student.** (Points to 'Extend Student')
- Click here to access refund forms.** (Points to 'Refund Student')
- Click here to view and print the student's acknowledgement form.** (Points to 'Acknowledgement')

The page also displays a 'Fee Breakdown' section with the following table:

Fee Breakdown	Amount (NZD)	Start Date	Duration (Weeks)	Frequency
Tuition Fees and Course-Related Costs	8,000.00	11/01/2018	43	
Health / Travel Insurance	200.00			
Accommodation	1,500.00	11/01/2018	43	Per Schedule
Living Expenses	1,500.00	11/01/2018	43	Per Schedule
Total Fees	11,000.00			
Non Tuition Costs				

Note: The actions available on the Actions button will change depending on the status of that student's account.

E.g. the 'Confirm Student' action is only available once Public Trust has authorised the student and the end of the refund period has been reached (please refer to the Confirming Student Attendance section for more details on the refund period).

Once a student has been confirmed, this action will no longer appear on the actions menu.

Changing student information or entering additional information

Once you've located and opened a student's record you'll be able to see the details that are recorded for them.

Note: Changes to citizenship, course details and the fee breakdown fields can only be made prior to any money being paid out to your Provider.

The screenshot shows the 'Student Details' section of the Public Trust Fee Protect system. The student's name is Charlotte King, ID is P8030389, and she was born on 07/12/1994. Her citizenship is New Zealand. The course is Coolkey 145, starting on 07/12/2015 and ending on 03/02/2016. The 'Current Student Balances' table is highlighted with a green callout box.

Current Student Balances	
Total Fees Expected	\$14,000.00
Money Received	\$10,010.00 03/02/2016
Paid to Provider	\$0.00
Refunded	\$0.00
Balance	\$10,010.00

This table displays the current balance for this individual student.

The screenshot shows the 'Fee Breakdown' section. It includes a 'Total Fees Expected Assist' field set to \$0.00. Below is a table for entering individual fees:

Fee Breakdown	Amount (\$NZD)	Start Date	Duration (Weeks)	Frequency
Tuition Fees and Course Related Costs	6,500.00	07/12/2015	13	
Health / Travel Insurance	500.00			
Accommodation	3,500.00	07/12/2015	13	Per Schedule
Living Expenses	3,500.00	07/12/2015	13	Per Schedule
Total Fees	14,000.00			
Non Tuition Costs				

A 'Save Changes' button is located at the bottom left of the form. A yellow callout box points to the bottom right of the form.

After making any changes click on the 'Save Changes and Process' button.



Note: Once you've "processed" any changes you must print out the revised Student Acknowledgement Form. Each time you make changes to a student account the version number of the form changes.

This form must be signed by the student and sent to Public Trust.

To avoid having to do this several times – do not get the student to sign the form until all details have been finalised.

Printing the Student Acknowledgement Form requires Adobe Acrobat to be installed.

Student course extension

If you allow a student to extend their current period of study to reach the required pass level you can record the new details as a course extension.

Click on the 'Actions' button on the 'Student Details' screen and click 'Extend the student' to be taken to the screen below.

Enter the new details including extra fees payable and time period, (if it's longer than 20 weeks you'll need to set them up as a new student), and click 'Save changes & Process'.

Extend Student

P8031394 - Barry Johnson

You can extend a student's time at a course on this page. You can alter course dates, fees required and enter notes, but no other details can be changed at this time.
(Fields marked with * are required)

Student Details

Student Name*
Barry Johnson

Provider Student ID
[Empty]

Date of Birth - Age: 19* **Gender***
27/10/1996 Male

Citizenship*
New Zealand

International Student

International
 Yes this is an international student

Passport Number
[Empty]

Student Loan
 Yes this student has a Student Loan

Course Details

These must be the actual course dates.

Course Name*
Woodwork 149 - Extension from P8031394

Start Date* **End Date*** **Course Length***
08/02/2016 18/03/2016 6

Additional Information

Notes
[Text Area]

Current Student Balances

Total Fees Expected	\$7,500.00	
Money Received	\$1,500.00	22/12/2015
Paid to Provider	\$0.00	
Refunded	\$0.00	
Balance	\$1,500.00	

Maximum for any extension is 3 months (the system will let 20 weeks be entered to allow for any holiday periods).

An additional Student Acknowledgement Form will be produced. Public Trust's administration fee for extensions will be charged at 50% of the normal Public Trust fee per student.



Note: The extension facility is designed for situations where the period of time the student is enrolled in their course is extended e.g. the student has not reached the required academic level and needs further tuition to pass the course. The extension facility cannot be used more than three times.

The extension facility should only be used:

- For extensions of the same course.
- Where the student details do not change.
- If the extension period does not exceed 3 months.
- A student may take a break (not exceeding 6 weeks) between the end of the first period and the start of the extension.

Where a student enrolls for a different qualification or to gain a higher level of qualification this is a new enrolment not an extension. If a student enrolls for a second year of study or takes a break exceeding 6 weeks this should be regarded as re-enrolment not an extension. Where a student re-enrolls the statutory refund period applies and the extension facility cannot be used.

Links between P and E Student Record

Once a student has been extended on a course a new Public Trust Reference number will be generated and will now begin with 'E'. On the 'Student Search' screen, both student records will appear when searching for a student, as shown below:

<input type="checkbox"/>	Student PT Reference Number	Provider Student ID	Status	Amount Expected	Received	Course Start	End
<input type="checkbox"/>	Barry Johnson - Woodwork 149 P8031394		Confirmed	7,500.00	1,500.00	30/11/2015	26/02/2016
<input type="checkbox"/>	Barry Johnson - Woodwork 149 - Extension From P8031394 E8031400		Incomplete	4,500.00	0.00	8/02/2016	18/03/2016

Student Payment Schedule

View the Student Payment Schedule by searching for a specific student record on the 'Student Details' screen, then clicking on the 'Actions' button and selecting "View Payment Schedule".

The Payment Schedule Screen provides a place to view:

- The total fees expected vs. the amount received, in expected payment date order.
- Which payments have been made – and which are outstanding.
- Payments of all tuition, living and accommodation expenses.

Public Trust Fee Protect

Students | Allocations | Reports | Users | More... | 6:28:36

Payment Schedule

Use this page to review this student's payment schedule.
You may also have additional functions available to you, under the Actions button.

[Actions](#)

Student Details

Student Name Barry Johnson	Public Trust Student Id P8031394	Provider Student ID
Course Name Woodwork 149	International <input type="checkbox"/> Yes this is an international student	
Start Date 30/11/2015	End Date 29/02/2016	Course Length 13

Financial Details

Total Fee Expected 7,500.00	Amount Received 1,500.00	Balance Amount 1,500.00
Amount Paid 0.00	Amount Repaid 0.00	Tuition Costs 5,000.00
Health / Travel Insurance Costs 500.00	Accommodation Costs 1,000.00	Living Costs 1,000.00

[Print Payment Details](#)

Payment Schedule

Date Paid or Due	Amount (NZD\$)	Type	Status	Actual Payment Date
30/11/2015	500.00	Health	Unpaid	
30/11/2015	307.69	Accommodation	Unpaid	
30/11/2015	307.69	Living	Unpaid	
05/12/2015	1,000.00	Initial Tuition	Unpaid	
28/12/2015	307.69	Accommodation	Unpaid	
28/12/2015	307.69	Living	Unpaid	
01/01/2016	1,450.55	Tuition	Unpaid	
25/01/2016	307.69	Accommodation	Unpaid	
25/01/2016	307.69	Living	Unpaid	
01/02/2016	1,362.64	Tuition	Unpaid	
22/02/2016	76.93	Accommodation	Unpaid	
22/02/2016	76.93	Living	Unpaid	

Confirming student attendance

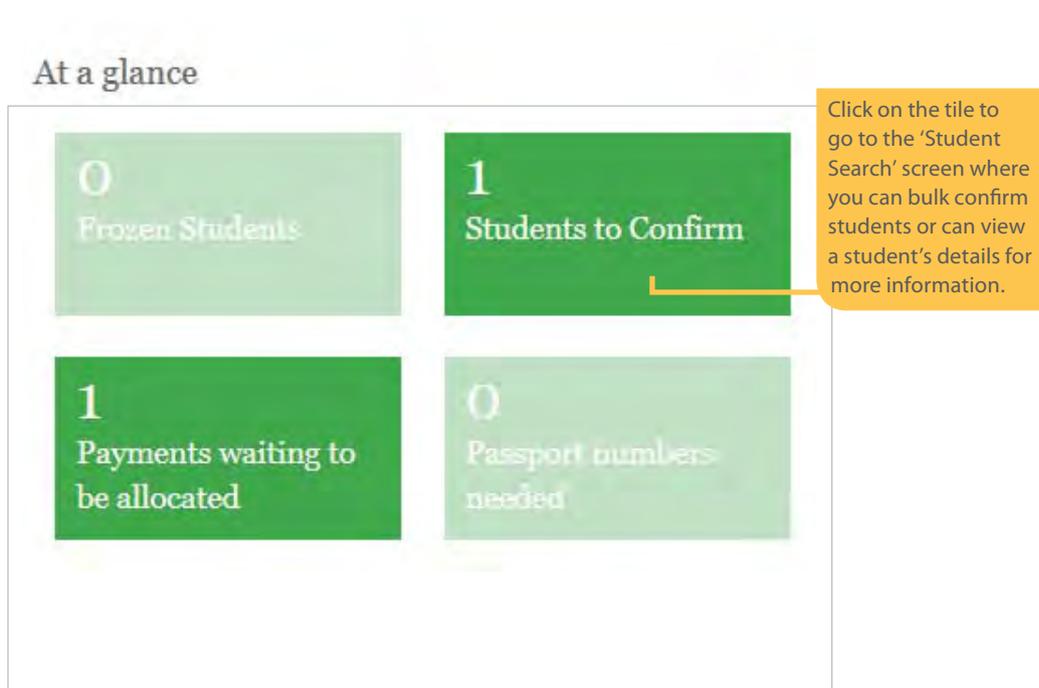
To ensure payments are released to your Provider you must confirm that a student is attending the course at the end of the refund period. If you do not confirm, payments on behalf of this student will not be made. You won't be able to confirm until the form has been reviewed and authorised by Public Trust.

The refund periods vary dependent on the length of the course and for the type of student.

Attendance can be confirmed online after:

- 5 calendar days for courses under 13 weeks for **domestic and international** students.
- 8 calendar days for **domestic** students on courses of 13 weeks or more.
- The 10th working day of the month for **international** students on courses of 13 weeks or more.

Any students whose ongoing attendance needs to be confirmed will be available to view from your 'At a glance' dashboard on the home page.



Note: You won't be required to confirm attendance until the form has been authorised by Public Trust.

The User Name of the person entering the confirmation (together with the time and the date) will be recorded on the student details.

Public holidays are not classified as working days.

Important: If you accidentally confirm attendance for a student that has not been attending, contact Public Trust immediately to have the confirmation removed. This is very important as you're not entitled to the payment if the student has not been attending. Care should be taken to ensure that the student has not withdrawn.

Managing receipt of student fees

Any unallocated student payments in your account to be processed will be displayed on the 'At a glance' dashboard. You'll also receive a weekly report by e-mail showing the payments still to be allocated.



Note: If the student uses the provided bank deposit slip, and you have entered all 7 digits of the Public Trust Student reference number into the analysis code boxes, then that incoming money will be directly allocated to the student, removing the need for you to do the next allocation steps.

We recommend you deposit funds using the 'drop box' at the bank as these deposit slips are scanned, and therefore eliminate the possibility of human error at the bank.

If you require more pre-coded deposit books, please order these by e-mailing feeprotect@publictrust.co.nz. These take 6 – 7 working days to be printed and delivered, so please monitor your own supply and place the order before you run out.

If the funds are not directly deposited to the student account, you will need to manually attribute it to the student's account.

The screenshot shows a dashboard titled "At a glance" with four data tiles:

- 0 Frozen Students
- 1 Students to Confirm
- 1 Payments waiting to be allocated
- 0 Passport numbers needed

An orange callout box on the left contains the text: "Click on the tile to bring you to the 'Allocate Money' screen where you can process unallocated funds." A line from this box points to the "1 Payments waiting to be allocated" tile.

Alternatively, you can click on the 'Allocations' tab when you have the necessary information to correctly identify the students to which the payments relate to. You will then see the screen shown on the next page.

The screenshot shows the 'Fee Protect' web application. At the top, there is a navigation bar with 'Students', 'Allocations', 'Reports', 'Users', and 'More...'. A search bar and a clock showing '00:29:39' are also present. The main heading is 'Allocate Money'. Below this, there is a progress indicator with three steps: 1. CHOOSE PAYMENT, 2. ALLOCATE MONEY, and 3. CONFIRMATION. Step 1 is currently active. The instruction reads: 'You can allocate money to students from here. Start the process by identifying the payment in your suspense account that needs to be allocated to your students, and then pressing 'Next: Allocate Money'.'

Step 1: Select a Specific Payment to Allocate

	Amount Paid (\$NZD)	Date Received	Details	
<input type="checkbox"/>	\$250,000.00	1/11/2015	Nicole	Actions
<input type="checkbox"/>	\$250,000.00	1/11/2015	Nicole	

At the bottom right of the table area, there is a button labeled 'Next: Allocate Money >'. The footer contains 'Copyright © 2016 - Public Trust Fee Protect' and 'Contact us on 0800 494 733 or feeprotect@publictrust.co.nz'.

Click here on the appropriate line to select the payment to be allocated.

! **Note:** An amount shown may apply to more than one student. It will be the total of all monies banked on the same day. The system allows you to split the deposit into the individual student accounts as you process it. You can also allocate multiple amounts to the same student.

Select the amount you wish to allocate and click on the 'Next: Allocate Money' button.

This will take you to the screen below:

You'll need to input the **Public Trust reference number(s)** for the student(s) for whom each amount has been paid.

Enter the Public Trust reference number for the first student whose fees are covered by this deposit.

If you do not have the reference number you can search for the student by entering 2 or more characters.

Fee Protect

Students Allocations Reports Users More...

Allocate Money

You can allocate money to students from here.
Transfer the available balance to as many accounts as you wish.

1 CHOOSE PAYMENT 2 ALLOCATE MONEY 3 CONFIRMATION

2. Allocate Money

Add the students who are being allocated amounts by entering their Public Trust Student ID.

Available Balance: \$4,492.00
This amount remains to be allocated.

Enter the amount you wish to allocate to each student, and then press 'Next: Complete Allocation'.

Public Trust Student ID	Student Name	Outstanding Amount	Amount to be Allocated
<input type="text" value="Search for student"/>		\$0.00	<input type="text" value="0.00"/>

Please enter 2 or more characters

< Cancel and Return to Payment Selection Next: Complete Allocation >

Select student into the student from the drop-down list on this screen and press 'Tab'.

Public Trust Fee Protect

Students Allocations Reports Users More... 00:28:59

Allocate Money

You can allocate money to students from here.
Transfer the available balance to as many accounts as you wish.

1 CHOOSE PAYMENT 2 ALLOCATE MONEY 3 CONFIRMATIONS

2. Allocate Money
Add the students who are being allocated amounts by entering their Public Trust Student ID.
Enter the amount you wish to allocate to each student, and then press 'Next: Complete Allocation'.

Available Balance
This amount remains to be allocated
\$250,000.00

Public Trust Student ID	Student Name	Outstanding Amount	Amount to be Allocated
P0442995	ANDREW ROBERT GRAHAM E3	\$3,515.00	

< Cancel and Return to Payment Selection Next: Complete Allocation >

To search for a student – click on the 'Students' tab, this will take you to the 'Student Search' screen. Here you can search for each student that needs money allocated to them. When you've located the correct student either write the Public Trust reference number down or highlight it as in the example below and copy it (CTRL+C

Allocation Details

Your allocation(s) have been successful. This page contains all details of the allocations, with the option for you to print to save for your records.
Please note that this is not a receipt.

Allocation

Amount Paid (\$NZD)	Date Received	Details
\$46,490.00	22/12/2015	alan test

Students

Public Trust Student ID	Student Name	Outstanding Amount	Amount to be Allocated
P0030389	Charlotte King	\$13,490.00	\$5,000.00

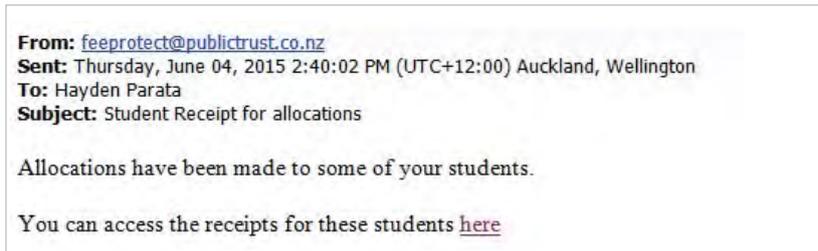
Close and Return to Allocations Print



Note: If the receipt is lost, it can be regenerated from the student's detail screen, via the "Actions" button.

or right click and select copy using the mouse).

After you have clicked on 'Complete Allocation' you'll be taken to the Allocation Details screen, which you may wish to print for your records. We recommend that you keep a copy of this in your student records. The staff member that allocated the money will also receive a receipt via email.



Student receipt for payment

Click here to download the receipts you have selected via ticking the tick boxes.

Download Selected	Student Name	Public Trust Reference	Date	Download
<input type="checkbox"/>				
<input type="checkbox"/>	Charlotte King	P8030389	08/01/2016 10:54 am	Download

Click here to download a receipt.

 **Note:** Your Provider is responsible for passing this receipt on to the student.

Incorrect allocations reversals

If you incorrectly allocate funds to the wrong student, or the wrong amount, you can reverse the incorrect allocation via the 'Actions' button on a specific student record. When clicked, you are given a list of all the previous allocations to this student, and tick boxes to select which payments to reverse.

Public Trust Fee Protect

Students Allocations Reports Users More... 00:29:44

Reversal of Allocated Funds

Actions

You can reverse the allocation of funds to a student on this page. This returns the allocated amount to your suspense account, allowing you to allocate it elsewhere from the Allocate Money screen.

If you cannot select a specific allocation shown below, it is because it has already been partially or fully paid to the student's Provider. To reverse this, you must contact Public Trust.

Student Details

Public Trust Student Id	Student Name	Amount Remaining (NZD\$)
P6442995	ANDREW ROBERT GRAHAM B3	\$0.00

Amount, date of allocation and details of allocation.

Amount Allocated (NZD\$)	Date Funds Allocated	Details

Click to confirm. [Reverse Allocations](#)

Copyright © 2016 - Public Trust Fee Protect Contact us on 0800 494 733 or feeprotect@publictrust.co.nz

The funds then reappear in the allocations page, with a reference to where they have come from. Only full payments can be reversed, please contact us if you require a partial reversal.

Allocate Money

ACTIONS

You can allocate money to students from here.
Start the process by identifying the payment in your suspense account that needs to be allocated to your students, and then pressing 'Next: Allocate Money'.

1 —
 2 —
 3
CHOOSE PAYMENT ALLOCATE MONEY CONFIRMATION

1. Select a Specific Payment to Allocate

Amount Paid (\$NZD)	Date Received	Details
<input type="checkbox"/> \$41,490.00	24/10/2015	alan test
<input checked="" type="checkbox"/> \$500.00	8/01/2016	Reversal From P8030389

Click the tick boxes for the funds you want to reverse.

Details of the reversal related to a Public Trust Reference number.

Freezing Students

You are able to freeze accounts. To do this open the student's record, tick "Frozen Student" and add the reason. To unfreeze contact Public Trust.

Public Trust can freeze payments if there is a pending refund or we are investigating a student complaint.

[Support & Contact](#) | [Manage my Details](#) | [Logout](#)

Students Allocations Reports Users More...
0:29:19

John Smith - P8030390

Review or modify this student. The Actions button will let you access additional functions for this student.

ACTIONS

Fields are mandatory *

Student Details

Student Name*

Provider Student ID

Date of Birth - Age: 20* Gender*

Citizenship*

Course Details

These must be the actual course dates.

Course Name*

Start Date* End Date* Course Length*

Current Student Balances

Total Fees Expected	\$10,000.00
Money Received	\$0.00
Paid to Provider	\$0.00
Refunded	\$0.00
Balance	\$0.00

International Student

International Yes this is an international student

Passport Number:

Student Loan

Yes this student has a Student Loan

Frozen Student

Yes this is a frozen student

Refund pending

Reason for freezing student

Credit Card

Yes this student has Credit Card enabled

Additional Information

Schedule Version: 1

Authorised by Public Trust on:

Attendance Confirmed on:

Links
No links available

Notes

Milestone Trust Accounts

Initially developed for flying schools, a Milestone Trust is based on the standard trust system. However, unlike the typical standard trust where payments are made on set dates, Milestone Trust payments are made as sections of the course or milestones are completed (e.g. flying time).

Student details are entered onto the website in the usual manner, producing an acknowledgement form to be printed and signed, however the Milestone Trust acknowledgement form payment schedule has slightly different wording as per below.

This text explains how the payments will be released.

Tuition fees	
<i>Tuition fees are paid to your education provider in arrears over the duration of the course. The first payment of 20% (to a maximum of \$3,000) will be paid at the end of the Refund Period and the remainder will be paid in instalments.</i>	
Amount	To be paid:
\$ 3,000.00	11 FEB 2014
\$ 57,000.00	All remaining fees will be paid in instalments when the trustee receives a Course Milestone Release Form signed by both the student and education provider
\$ 60,000.00	

After the first payment is made, all future payments are then released as agreed by the Provider and the student.

These are released on either agreed milestones, or in the case of flying schools, invoices generated fortnightly or monthly based on the tuition completed.

The form is produced by clicking 'Download Release Form' from the 'Action' button, found on the student account screen.

The screenshot shows the 'Fee Protect' website interface. At the top, there's a navigation bar with 'Students', 'Allocations', 'Reports', and 'More...'. Below that, the student's name 'Malcolm Johnson - P8030354' is displayed. A grid of action buttons is visible, including 'View Acknowledgement Form', 'View Payment Schedule', 'Download Release Form', and others. A yellow callout box highlights the 'Download Release Form' button with the text: 'Click here to produce the Payment Release Form.'

An example of the form is found on the following page.

Course Milestone Release Form

Please use this form

1. to authorise the Trustee to release the second and subsequent payments of Tuitions Fees;
2. to confirm that the education provider and student has agreed to the amount to be paid

PTE Name: FEEPROTECT FLIGHT TRUST
Public Trust PTE Reference Number: 7803184TR01
Name of Student: CHARLES BIGGLESWORTH
Public Trust Student Reference Number: P6443400
Student Date of Birth: 15 MAY 1972
Course Start Date: 03 FEB 2014
Estimated number of weeks: 46
Tuition fees: \$60,000.00

Payment Number	Date	Amount	Balance remaining	Student signature	PTE signature
1		\$3,000.00	\$57,000.00	Not required	Not required
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

Once signed by both student and education provider, please send to:

Email: feeprotect@publictrust.co.nz

Fill in the date, amount of the drawdown, the balance remaining after drawdown, then have both the student and the Provider sign the form to acknowledge the drawdown amount is correct.

Once complete email the form using the details on the bottom of the form for the payment to be processed.

Payment options

There are a number of ways a student can pay their student fees straight into their student account in Fee Protect:

- Deposit fees into the Public Trust bank account using the account information on the first page of the student acknowledgement form.
- Use a pre-coded bank deposit slip.
- Use the Provider’s EFTPOS terminal.
- Send a telegraph transfer (international students).
- Pay by credit card.



Note: It is a requirement of NZQA’s student fee protection policy that:

1. Any student fees paid to a Provider must be placed into the trust account by close of business on the following working day.
2. All fees paid, including any agent commission, must be protected. This means you’ll need to “top up” any agent commission retained by your agents. E.g. the student paid \$5,000, the agent forwarded you \$4,000 you will need to top up the \$1,000 retained by the agent as their fee.

Bank Account details on the acknowledgement form

A student may deposit their fees straight into their Fee Protect student account by using the bank account details on the front page of the Student acknowledgement form:

Fee Protect Student Acknowledgement Form



Please read this form carefully. It explains how your student fees will be protected, how your education provider will be paid and how refunds will be handled.

By signing this form I, WALKER R MCNAUGHTON confirm I understand that:

1. my education provider has appointed Public Trust as trustee and my fees will be held by Public Trust in a trust account to comply with the requirements of the Education Act 1989 (Act). The rules for this trust account are set out in a Trust Deed between my education provider and Public Trust;
2. my fees totalling \$ 1,200.00 will be paid from the trust account to my education provider in instalments over the 10 week duration of my course in accordance with the attached payment schedule. I have signed the bottom of the payment schedule page(s) to confirm that I understand these payments;
3. where I have paid my fees direct to my education provider, my education provider is required to transfer those fees to Public Trust and Public Trust has no responsibility for those fees until they are received into the trust account. My education provider is not an agent for Public Trust;
4. I can pay my full student fee directly to the following Public Trust bank account.

Account Name:	Public Trust
Bank and Branch:	Bank of New Zealand, North End Branch, Wellington, New Zealand
Bank Account Number:	0 2 0 5 3 6 0 3 0 5 8 6 5 0 1
Analysis Code:	0 5 3 2 5 2 — Student number.

5. I agree that if my course is cancelled or my education provider closes:
 - (a) Public Trust will ensure that any refund due to me will be made in accordance with the Act and the current Qualifications Authority student fee protection rules;

Pre-coded deposit slips

You can pay in cash or cheques at BNZ using the pre-coded deposit slips that will be supplied to you.



Note: Please ensure the 'analysis code' field contains all 7 numbers of the student's 'P' or 'E' number (not the letters) and these funds will automatically be allocated to the correct student, removing the need for you to allocate money.

If you wish to deposit funds for multiple students using one deposit slip, you will need to enter a numeric code. This code will be used as a reference on the 'Money to be Allocated' screen to distinguish the payment. You will need to keep a record of which students this code relates to.



Note: We recommend you deposit funds using the 'drop box' at the bank as these deposit slips are scanned, and therefore reduce the possibility of human error at the bank.

EFTPOS

Some Providers have set up their EFTPOS facility so that they can nominate the account payments are to be credited e.g. button A for payments to the Provider bank account and button B for payments to the Public Trust Fee Protect account.

We suggest you talk to your EFTPOS supplier if you're interested in this facility.

Telegraphic transfers

Instructions to Providers for completing telegraphic transfers.

You can produce a personalised Telegraphic Transfer form by selecting 'Telegraphic Transfer Form' from the 'More...' tab.

This will generate a pdf that you can download and send to students or agents to remit fees direct to Public Trust. The form will need to be pre-filled by your Provider before it's sent to the student with the invoice for fees.

It's very important that the instructions below are followed carefully and that all fields on the Telegraphic Transfer are correctly completed to enable your Provider to match the payment of fees to the correct student record (see below):

-
- 1. Sender Details (Field 50A) – The student or agent will complete this field** with the name and address of the person who is remitting the fees. If this person is not the student we recommend they include their relationship to the student in this section (e.g. agent, parent etc.)
 - 2. Payment details (Field 32A) – The student or agent will complete this field** with the date and amount being paid to your Provider as per the final invoice for fees.
 - 3. Student & Provider details (Field 70) – You need to complete this field before the Telegraphic Transfer Form is sent to the student or agent to pay the fees.** It needs to be fully completed to ensure that your Provider can correctly identify the student who is paying the fees. It's very important to enter the student's full name and either the student reference (ID) number your Provider is using or a passport number before the form is sent to the student or agent to pay.
-

Morris Valley School

Telegraphic Transfer to

Public Trust, Wellington, New Zealand

This form assists your Bank arrange the Telegraphic Transfer of your student fees to a Trust Account with Public Trust, Wellington, New Zealand

Your fees are held in this Trust Account and paid to the **Morris Valley School** over the period you attend your course(s).

Senders Details: 50a

Name: _____

Address: _____

Contact Phone number: _____

Details of funds to be transferred: 32a

NZ \$: _____ Date Sent: _____

Please add bank fees to this amount as advised by your bank.

The funds will be transferred to: 57 / 59

Bank of New Zealand
North End Branch
100 Lambton Quay
Wellington

Account Name: Public Trust Morris Valley School
Bank account: 020536030586501
Swift Code: BKNZLN22

Student details and PTE: 70

Family Name | | | | | | | | | | | | | | | | | | | | | |

First Name | | | | | | | | | | | | | | | | | | | | | |

Student Ref. | | | | | | | | | | | | | | | | | | | | | |

PTE Ref. | C | L | I | 0 | 0 | 3 | 6 | 1 | 0 | 3 | 7 | | | | | | | | | | | |

Details of charges 71a

To be borne by Sender (OUR)

Payment options

Online Credit Card facility

For Providers, who request this facility, this can be set-up with a credit card payment option on the Fee Protect website to let your students pay their fees by credit card direct to their Public Trust account.

If you would like to set up this credit card payment facility, the Provider owner or director needs to send us a written request acknowledging agreement to pay the 2.05% BNZ transaction fee for any fees paid by credit card.

How it works

Once you've been setup to receive online payments, follow these simple instructions to start accepting credit card payments

(Visa and Mastercard only) within Fee Protect:

1. Log in to the Fee Protect website.
2. Enter the details of a new student in the usual way. You can also call up the details of any student that you have set up already, as long as they have an outstanding payment.
3. Once all the details have been entered correctly, click on the 'Actions' button, then select 'Credit Card Details'.
4. You'll be redirected to a page with two tabs – **Student Present** or **Student Not Present**.
5. If the student is present (or they have given you their credit card details) and is ready to make payment via their credit card, then enter their credit card details on the page and click 'Pay'. Please refer to 'Student Present' section of this manual.
6. If the student is not present and you have their email address, proceed to the Student Not Present section. Please refer to the 'Student Not Present' section of this manual.

Student payment by Credit Card

Use this page to create a credit card payment for a student.

Student Information

Student Name
Barry Johnson

Public Trust Student ID
P8034394

Provider Student ID

Current Student Balances

Description	Amount	Date
Total Fees Expected	\$7,500.00	
Money Received	\$1,500.00	22/12/2015
Paid to Provider	\$0.00	
Refunded	\$0.00	

Credit Card Payment and Details

You can use either of the options below - where the student is present with their card, or where the student is not present. If the student is not present they will be sent an email containing instructions for paying their fees by Credit Card online. Please note that for your security we do not hold credit card details in Fee Protect.

Student Present | Student Not Present

All fields must be completed

Card Type Choose...	Name on Card
Card Number Enter your card or digit Visa or Mastercard number.	CVC Code This is a three digit code on the back of your card.
Expiry Date Month: Year:	Amount Enter the remaining amount due or full payment. Defaults to the total amount.

Pay **Clear**

Student present

The first tab on the 'Student Payment by Credit Card Page' (below) is to be used when the student is present (or they have given you their credit card details) and is ready to make payment via their credit card.

Complete the required fields on this tab, taking care to enter the details exactly as they appear on the card. Click 'Pay' to initiate the transaction.

Credit Card Payment and Details

You can use either of the options below - where the student is present with their card, or where the student is not present. If the student is not present they will be sent an email containing instructions for paying their fees by Credit Card online. Please note that for your security we do not hold credit card details in Fee Protect.

Student Present Student Not Present

All fields must be completed

Card Type Choose...	Name on Card [Text Field]
Card Number [Text Field] <small>Enter your 16 or 19 digit Visa or Mastercard number.</small>	CVC Code [Text Field] <small>The 3 or 4 digit code on the back of your card.</small>
Expiry Date Month Year	Amount 6,000.00 <small>Enter the amount you wish to pay (maximum \$10,000.00).</small>

Pay **Clear**



Note: The amount field will automatically default to the outstanding amount for that student. Make sure to double check this field before initiating the transaction.

Once payment is initiated, the amount will be charged to the student's credit card using BNZ's credit card service. When all details have been validated, a receipt will be presented on screen (below) which can be printed for the student's records by clicking on the 'Print Receipt' button.

Transaction Receipt

Thank you, your payment has been confirmed. Please print a copy of this receipt for your records.
Your invoice number is: 604989

Invoice number:	604989
Time:	10/06/2015 04:23:39 p.m.
Amount:	\$2,000.00
Student ID:	P8001021
Recipient:	Pallavi Patel
Provider ID:	3575219TR01
Provider:	Test Provider for Nicole

Print Receipt **Close**

The payment will be received at Public Trust from BNZ within 2 business days (depending on where the credit card has been issued). Once received, the Fee Protect system automatically updates the student's record and records that payment has been made. You DO NOT need to allocate the money to the student, this is done automatically.



Note: should the transaction fail, you will receive a payment declined message.

Student not present

The second tab on the 'Student Payment by Credit Card Page' (below) is to be used when the student is not present, but you have their email address.

Enter and re-enter the email address of the student.

Credit Card payment and details

You can use either of the options below - where the student is present with their card, or where the student is not present.
If the student is not present they get sent an email containing instructions for paying their fees by Credit Card online.
Please note that for your security we do not hold credit card details in Fee Protect.

Student present Student not present

All fields must be completed

Student Email address

Confirm Student Email address

Click 'Email Student' to send an email requesting payment to the student (example below).

Fees for your training course are due

This email has been sent to you by Public Trust on the instruction of Morris Valley School. Public Trust provides student fee protection services for Morris Valley School.

The fees for your training course are now due for payment. You have requested to pay these fees by Credit Card, which is done through our secure payment facility.

[Use this link to transfer to our secure payment facility](#)

Note: This link will expire at Friday, 8 January 2016 11:44 a.m., and can only be used once.

About Fee Protect

The New Zealand Government requires that registered private training providers must protect all fees paid to them in advance. This means that in the unlikely event that your training provider cannot complete your course, the remainder of your fees will be protected.

For further information about Public Trust's fee protection service please visit www.feeprotect.co.nz or contact your training provider.

Please don't reply to this email - this email address is not monitored.

When the student is ready to pay, they can click on the link in the email and will be redirected to Public Trust's secure online payment environment where they can enter their credit card details and initiate the transaction. They will be asked to authenticate themselves by entering the course start date, along with their credit card details. From this point on, the steps are similar to the **Student Present** scenario.



Note: that the address where the email is sent from is feeprotect@publictrust.co.nz and will show as an email from Public Trust in the student's in-box.

Refunds

There are two refund form options.

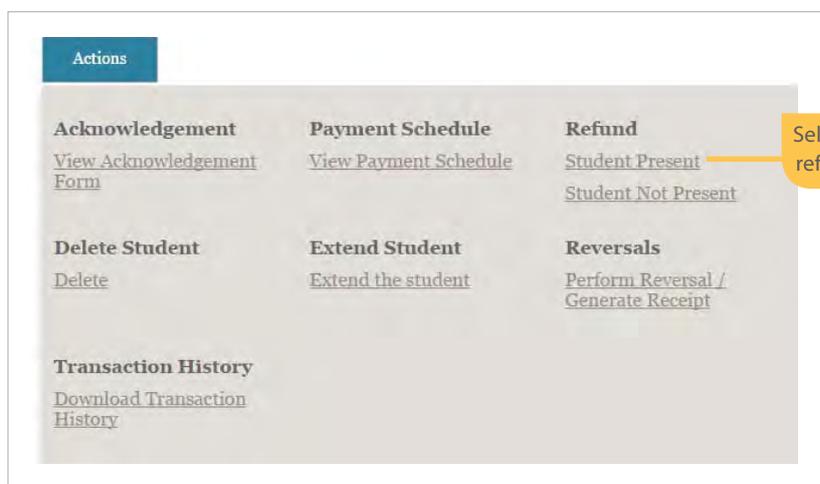
Student Present:

For signing by the student and the Provider (also known as Schedule 2). This is to be used when a refund is due, and the student is available to sign the document.

Student Not Present:

For signing by the Provider if a student is unavailable to sign (also known as Schedule 3). This is to be used when a refund is due, and the student is not available to sign the document.

The two options can be found by selecting the 'Actions' button on the specific Student Details screen. Both options will present you with an online form you can type details into that will print out on the resulting refund form.



Note: the option to make a refund to StudyLink will appear on the online form if the student has a student loan, as indicated on their student details.

If you have submitted a StudyLink refund in error, please contact Fee Protect immediately on the same day to have a stop put on this.

Student present refund form

Student Refund Request (Student Present)

Complete all details on this page to finish the refund process.
 Use the 'Generate PDF' button to review and prepare the form for the student to sign.
You must do this before you press 'Process Refund'.
 After pressing 'Process Refund' you will not be able to return to this page or print the required form for signing, so make sure you do it here.

Actions

Provider Information

Provider Name
Demo Training Ltd

Provider Reference
CL100300546

Student Information

Full Name
Chris Moore

Public Trust Student ID
P8009538
The Public Trust Reference Number for the student.

Date of Birth
15/05/1972
The student's birth date (month, day, year).

International
 Yes this is an international student

Course Start Date
31/10/2016
The start date of the course.

Course Length (weeks)
52
The number of weeks of the course.

Reason for Request*
Withdrawal

Refund Information

Date of Withdrawal
10/11/2016
The date the student withdrew from the course.

I confirm this refund is made in accordance with the terms of the education provider's early withdrawal and refund policy, which complies with the Education Act, details which have been provided to the Student.

Current Student Balance

Total Fees Expected	\$15,000.00
Money Received	\$66.00 10/11/2016
Paid to Provider	\$0.00
Refunded	\$0.00
Balance	\$66.00

Current Student Balance and Total Amounts Payable

The table shows each payment type (including any fees) and the total amount payable for each payment type.

Total Refundable Balance	Tuition Fees and Course Related Costs	Health / Travel Insurance	Accommodation	Living Expenses	Overpayment of Fees
\$66.00	13,000.00	0.00	0.00	0.00	66.00

Refund Amount Details

Select the total amount you wish to receive (the total amount you wish to receive is the total amount you wish to receive).

Refund being paid to	Tuition Fees and Course Related Costs	Health / Travel Insurance	Accommodation	Living Expenses	Overpayment of Fees
<input checked="" type="checkbox"/> Student Refundable: \$66.00	66.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Provider Refundable: \$0.00	0.00	0.00	0.00	0.00	0.00

Student or Third Party Bank Account Details

New Zealand Bank Account
 Yes, this refund is to a New Zealand bank account.
 No, this refund is to an International bank account.

Destination Country
-- Please Select --

Name of Account Holder
[Text Field]

Bank and Branch Name
[Text Field]

Bank Account Number
[Text Field]

Swift Code
[Text Field]

Full Street Address of Student or Third Party
[Text Field]

Full Name and Address of Bank
[Text Field]

Generate PDF Previous Refund Cancel

The 'Actions' button enables you to return to the student details.

You can enter the date of withdrawal for your records.

This tick box confirms the refund is made in accordance with terms and conditions.

This figure shows the total refundable balance for this student.

Each row represents an eligible refund recipient. Select using the tick box, which recipient the refund is to be allocated to. **Note:** Studylink will only display if the student has a student loan as indicated on their student details.

Student information are non-editable fields.

Enter a detailed reason for the refund request. This is a mandatory field.

This row gives a breakdown of the fees allocated to each payment type (e.g. accommodation).

If you do not want the refund to repay lines from the payment schedule, select the total amount for that recipient as an overpayment. All other columns will affect the payment schedule.

Enter the student or third party bank account details in this section.

Once you have completed the form. Use the 'Generate PDF' button to review and print the form for the student to sign. **Note:** you must do this before you press 'Process Refund'.

The 'Process Refund' submits the form to Public Trust. **Note:** after submitting the form you will not be able to edit or print the form.

Student not present refund form

Student Refund Request (Student Not Present)

Complete all details on this page to finish the refund process.
Use the 'Generate PDF' button to review and prepare the form for the student to sign. **You must do this before you press 'Process Refund'.**
After pressing 'Process Refund' you will not be able to return to this page or print the prepared form for signing, so make sure you do it here.

Actions

Provider Information

Provider Name:

Provider Reference:

Student Information

Full Name:

Public Trust Student ID:

Date of Birth:

International: Yes this is an international student

Course Start Date:

Course Length (weeks):

Reason for Request*:

Refund information

Date of Withdrawal:

I certify this refund is made in accordance with the terms of the withdrawal procedure or early withdrawal and refund policy, which complies with the Education Act, details which have been provided to the student.

Current Student Balance

Total Fees Expected	\$11,000.00
Money Received	\$6,000.00
Paid to Provider	\$0.00
Retained	\$0.00
Balance	\$5,000.00

(a) Complete this section if the student has completed the course and you can confirm:

- We have done all things reasonably practicable to contact the student and/or their parents or guardians to obtain their consent to the release of the balance of funds held.
- The student has paid their student fee to the Trustee, but has failed to sign the required Student Acknowledgement Form (or Course Milestone Release Form), and
- Evidence of the Student's attendance at the course is attained and the course is now at an end (attach evidence of Course completion).

Yes, I can confirm the above three points.

(b) Complete this section if the student has withdrawn from the course and the following circumstances apply:

Student has failed to notify us that he/she has withdrawn from the course prior to the course start date, or within the early withdrawal period.

Student has been expelled or failed to meet the attendance requirements.

The student has paid their student fee to the Trustee, but has failed to sign the required Student Acknowledgement Form (or Course Milestone Release Form).

We have done all things reasonably practicable to contact the student and/or their parents or guardians to discuss the student's continuing study and/or withdrawal from the course and have not been able to make contact.

The course is now at an end.

Please note that the Qualifications Authority's consent is required (if a refund is required before the Course end date (plus 30 days for Milestone Trusts) or in any other circumstances if the Trustee is not satisfied with information provided by the PTIC.

Current Student Balance and Total Amounts Payable

Total Refundable Balance	Tuition Fees and Course Related Costs	Health/Travel Insurance	Accommodation	Living Expenses	Overpayment of Fees
66.00	66.00	0.00	0.00	0.00	0.00

Refund Amount Details

Refund being paid to	Tuition Fees and Course Related Costs	Health/Travel Insurance	Accommodation	Living Expenses	Overpayment of Fees
<input checked="" type="checkbox"/> Student Refundable \$0.00	66.00	0.00	0.00	0.00	0.00
<input type="checkbox"/> Provider Refundable \$0.00	0.00	0.00	0.00	0.00	0.00

Student or Third Party Bank Account Details

New Zealand Bank Account: Yes, this refund is to a New Zealand bank account. No, this refund is to an International bank account.

Destination Country:

Name of Account Holder:

Bank and Branch Name:

Bank Account Number:

Swift Code:

Full Street Address of Student or Third Party:

Full Name and Address of Bank:

Generate PDF Process Refund Cancel

The 'Actions' button enables you to return to the student details.

You can enter the date of withdrawal for your records.

This tick box confirms the refund is made in accordance with terms and conditions.

This figure shows the total refundable balance for this student.

Each row represents an eligible refund recipient. Select using the tick box, which recipient the refund is to be allocated to. **Note:** Studylink will only display if the student has a student loan as indicated on their student details.

Student information are non-editable fields.

Enter a detailed reason for the refund request. This is a mandatory field.

This row gives a breakdown of the fees allocated to each payment type (e.g. accommodation).

Enter the student or third party bank account details in this section.

Once you have completed the form. Use the 'Generate PDF' button to review and print the form for the student to sign. **Note:** you must do this before you press 'Process Refund'.

The 'Process Refund' submits the form to Public Trust. **Note:** after submitting the form you will not be able to edit or print the form.

Reports

Manual reports available on request

The following reports can be requested from the 'Reports' tab of the website.

Annual statement of account – current year

Shows Student Fees, Account Summary, Income Summary and Statement of Account for the current period.

Annual statement of account – previous year

As above for the previous period.

Authorised Student Report

Shows the count per Provider of authorised students within Fee Protect for a given period.

Cash Flow Report

Shows all estimated cash flow assuming all student fees have been received and breaks it down to Authorised/ Unauthorised and Stopped payments.

MLA Report – Previous Month End

Using student details from the Standard Refund Trust to calculate the current student's portion of the MLA for protection by a Static or Bank Bond Trust.

Ministry of Education Export Levy Report

Shows Tuition Fees received, the number of international students who commenced a course, and the number of full-time equivalent tuition weeks for all international students for current and previous trimesters. The figures calculated in the report can then be used directly on the Ministry of Education website to calculate the Export Levy.

Student Exception Report

Lists students that need to be authorised, confirmed, or have insufficient/excess funds.

Student Account Balance Report

Shows all fees received, paid and repaid, and current student account balances.

Transaction report

You can request information using transaction start date, transaction end date, student ID, student name and course. This report is provided in Excel format, allowing you to analyse or summarise the figures.

Automatic reports

The website provides a number of reports automatically. These reports are distributed by e-mail periodically, and are sent to the primary e-mail address that was provided when your Fee Protect Trust account was established.

As required	Payment Advice This schedule shows the details of payments made on behalf of each student. This breakdown of payments is sent whenever a payment is made to the Provider.
Weekly	Student Exception Report This report lists students who have not been authorised by Public Trust, haven't had their attendance confirmed, where there are fees owing, or they've overpaid. Outstanding Amounts to be Allocated Report This report lists the amounts paid into your trust account that are still to be linked with a student record. No part of these monies can be disbursed to the Provider until this allocation has been done
Monthly	Tuition Fees month-end report Shows all Provider Tuition Fee information in an excel spreadsheet format.
Quarterly	Invoice of fees This is the invoice for fees charged for student registrations.
Annually	Financial year end Financial Year End Statement Of Account Note: This report can be run manually during the year, but you'll need to do this yourself. The report can only be backdated to the end of the previous financial year.

Automated reports can be sent to other Fee Protect Users within your Provider, by entering their email address in the 'Alternate Email Addresses' tab.



Note: Reports can only be sent to Users set up within the Fee Protect website as either an Admin or Super User. These Users will need to login to the Fee Protect website to access the report.