

## ENROLMENT PROCEDURE

### RELEVANT STANDARD(S):

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| <a href="#">Standards for Registered Training Organisations (RTOs) 2015</a> | <b>Standard 1 / Chapter 2 - Enrolment</b> <ul style="list-style-type: none"> <li>Clauses 1.2, 1.7, 1.12</li> </ul> <b>Standard 5 / Chapter 1 – Marketing and Recruitment</b> <ul style="list-style-type: none"> <li>Clauses 5.1-5.4</li> </ul> |
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| Enrolment Procedure   |  |
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| PURPOSE               | <p>To ensure complete and accurate enrolment, according to the provisions of the Enrolment Policy.</p> <p>Changes to this procedure may only be made upon approval of the Administrator.</p> |
| ROLE UNDERTAKING TASK | Admissions Team  |
| DOCUMENT UPDATE       | 26/01/2023   |

| Handling Course Enquiries |                              |   |
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| No.                       | Person/s Responsible         | Steps to take   |
| 1                         | Clients / Potential Students | <p>(1) Make arrangements with the Admin Staff providing the student's, Information, and availability for training via email, phone or in person. Trainers are responsible for coordinating the training information between the student and RTO Administrator</p>   |
| 2                         | Sales / Admin staff          | <p>(1) Answer enquiry using most up-to-date references</p> <p>(2) Provide reference to relevant information, particularly:</p> <ol style="list-style-type: none"> <li>Website</li> <li>Course Information</li> <li>Fees and Terms and conditions</li> <li>Policies and Procedures</li> <li>Student Handbook</li> <li>Enrolment Form</li> <li>Pre-Enrolment Assessment Form (for Competency and LLN Assessment)</li> <li>Pre-requisite Requirements (if applicable)</li> </ol> <p>NOTE: The student handbook, policies and procedures, course information (brochures) and terms and conditions must be publicly accessible via the website. Direct the enquiry to the required information</p> |

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|   |                        | <p>AND email relevant documents. In particular, send the student a copy of the following:</p> <ol style="list-style-type: none"> <li>Course brochure (or link to the course information on the website)</li> <li>Student handbook (or link to the student handbook)</li> <li>Policies and procedures (or link to the online version)</li> <li>Fees and terms and conditions (or link to online version)</li> <li>Pre-enrolment Assessment Form</li> </ol>  |
| 3 | Sales /<br>Admin staff | <p>(1) If you notice any inconsistencies or outdated information on any of the marketing resources available to potential students, report it to the Marketing Team immediately.</p> <p>(2) Send an email to the Marketing Team including details of the issues identified.</p> <ol style="list-style-type: none"> <li>Use subject title <i>'Marketing update required: xxx'</i></li> <li>For example, <i>'Marketing update required: incorrect course dates for TAE40116'</i></li> <li>Provide links and references, where relevant.</li> </ol> <p>(3) The Marketing Team must respond in writing to acknowledge your email.</p> <p>(4) Critical Issues</p> <ol style="list-style-type: none"> <li>If the issue is critical/urgent (e.g. providing incorrect information about the course, missing critical information, and/or causing confusion with students), follow up with the Marketing Team <u>daily</u> until you receive a written acknowledgement.</li> <li>Should you not receive a written acknowledgement within <u>2 business days</u>, notify the Director, Marketing immediately by forwarding the details via email.</li> </ol> <p>(5) Minor / Non-Critical Issues</p> <ol style="list-style-type: none"> <li>If the issue is minor/non-critical/non-urgent (e.g. typographical error, aesthetic issues, etc.) follow up with the Marketing Team weekly until you receive the written acknowledgement</li> <li>Should you not receive a written acknowledgement within <u>2 weeks</u>, notify the Director, Marketing immediately by forwarding the details via email.</li> </ol> |

**Pre-Enrolment Procedure**

| No. | Person/s Responsible                                      | Steps to take   |
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| 1   | Admissions /Administration Officer                        | <p>(1) When a student is ready to enrol, collect and assess completed pre-enrolment documents and pre-requisite requirements (if applicable):</p> <ol style="list-style-type: none"> <li>Necessary course requirements / pre-requisite requirements</li> <li>ID and supporting documents for processing and filing</li> <li>USI Number</li> </ol> <p>(2) Ensure all forms are filled out correctly, signed and dated.</p> <p>(3) Ensure the student is NOT on student visa</p>  |
| 2   | Trainer/<br>Assessor<br><br>Administrations/<br>Admission | <p>(1) As part of the pre-enrolment assessment, students are required to go through an initial pre-enrolment interview with one of ERDI Academy's trainers and assessors*. This pre-enrolment interview will be done via online platforms such as Zoom and Microsoft Teams, where they will be asked to do tasks and answer questions to confirm sufficient computer skills, including knowledge to operate video-communication services.</p> <p>*This part of the process will only be done by ERDI Academy's trainers and assessors (not the Administrations/ Admission) to ensure that the students' computer skills are assessed thoroughly, and students are at a level required by the courses, or further support will be recommended.</p> <p>(2) After the review of the pre-enrolment documents including the pre-enrolment assessment form, advise student (in consultation with the Trainer / Director, Talent and Culture and according to the student's pre-enrolment assessment form) through phone and/or email on the following:</p> <ol style="list-style-type: none"> <li>Eligibility for RPL and/or Credit Transfer (if applicable)</li> <li>Support Services / LLN Support</li> <li>Recommended Pathway and Amount of Training</li> </ol> <p>(3) Document the student responses and address student enquiries</p> <p>Eligibility for Recognition</p> <p>(1) Where the student declares he/she holds units of competency that may be credited towards the completion of the course, refer to RPL and Credit Transfer Procedure.</p> <p>(2) Where a student has declared he/she holds relevant prior training and/or professional experience that may be credited towards the completion of the course, AND meets eligibility requirements, refer to RPL and Credit Transfer Procedure.</p> |

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| 3 | Administrations/<br>Admission | <p>(1) Check availability of slots, where relevant, e.g. F2F classes.</p> <p>(2) Where relevant, send the student:</p> <ul style="list-style-type: none"> <li>a. RPL application form</li> <li>b. Credit transfer form</li> </ul> <p>(3) Proceed to the Enrolment Procedure</p> |
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| Enrolment Process |                            |  |
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| No.               | Person/s Responsible       | Steps to take  |
| 1                 | Administrations/ Admission | (1) Check that all pre-enrolment documents have been submitted, then finalise the training schedule and details with the student and Manager. A Training Plan will be provided.  |
| 2                 | Finance                    | <p>Process Payment</p> <p>(1) IF PAYMENT IS MADE IN PERSON, e.g. via EFTPOS, credit card or cash, record payment and issue receipt. Receipt is also sent via email.</p> <p>(2) IF PAYMENT IS DONE ONLINE, e.g. via the website, payment is processed automatically and receipt is sent via email.</p> <p>(3) Notify Enrolment Coordinator of payment received.</p> <p><i>NOTE: Do not accept advanced payment over \$1500. Payments over \$1500 must be returned to the customer. Refer to Fees and Payments Policy for more guidance.</i></p>   |
| 3                 | Administrations/ Admission | <p>Verify USI</p> <p>(1) IF THE STUDENT PROVIDED USI, Verify student USI via:</p> <ol style="list-style-type: none"> <li><a href="https://portal.usi.gov.au/org/">https://portal.usi.gov.au/org/</a> OR</li> <li><a href="https://www.usi.gov.au/">https://www.usi.gov.au/</a></li> </ol> <p>(2) IF THE STUDENT DID NOT PROVIDE USI,</p> <ol style="list-style-type: none"> <li>refer the student to the Student Handbook where information on how to get USI is provided, and</li> <li>have the student sign a waiver indicating that he/she understands that the RTO will not issue certificates without a verified USI number. The waiver may be sent via email (with acknowledgement receipt), or as a hard copy signed by the student in person. File the signed/acknowledged waiver with the student's enrolment documents.</li> </ol> |
| 4                 | Administrations/ Admission | <p>(1) Once payment is confirmed, enrol the student into the Student Management System and Student Portal (where applicable).</p> <p>(2) Prepare the welcome email for students. The welcome email must include all the course resources, or links to where they can be accessed.</p> <p>(3) Determine and organise resources required for the course—refer to the Training and Assessment Strategy to check resources required. Typically:</p> <ol style="list-style-type: none"> <li>Account details for the Student Portal, if relevant.</li> <li>Learner guides / Textbooks / Reading materials</li> </ol>   |

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|  |  | <ul style="list-style-type: none"> <li>c. Assessment workbooks / Assessment templates</li> <li>d. Vocational placement pack, if relevant</li> <li>e. Class schedules / Session schedules, if relevant, e.g. courses with F2F or webinar components</li> </ul> <p>Endorse new students to trainer/s.</p> |
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**VERSION CONTROL**

| Version Control Table |                          |                  |         |                        |                  |
|-----------------------|--------------------------|------------------|---------|------------------------|------------------|
| Date                  | Summary of Modifications | Modified by      | Version | Date of Implementation | Next Review Date |
| 26/01/2023            | Document creation        | 360RTO Solutions | v. 1.0  | 29/01/2024             | 28/01/2025       |

| RTO INFORMATION  |                            |
|------------------|----------------------------|
| Document Name    | Enrolment Procedure v1.0   |
| RTO/Company Name | ERDI Academy               |
| RTO Code         | 46102                      |
| Manager          | Administrations/ Admission |