



22 April 2024

Tēnā koe

Official Information Act Request

Thank you for your email of 21 March 2024, requesting information about the Training Incentive Allowance, including processing guidelines, evidence required, and information about the cessation or extension of TIA.

I have considered your request under the Official Information Act 1982 (the Act). Please find my decision set out below.

- 1. A copy of the WINZ processing standards for Training Incentive Allowance (TIA) applications.*

Please find a copy of the Ministry's Training Incentive Allowance processing standards and the Training Incentive Allowance information guide for staff attached with this response. Please note that the links contained in these documents are internal Ministry links and unavailable to view.

- 2. The written specific criteria for what costs the training provider must include in the "training details" section of "Training Incentive Allowance Application" form S12.*

When Training Providers are completing their section of the Training Incentive Allowance form (on page 6, question 12), they enter costs that are specifically required to complete the course. For example, course fees or student fees and/or essential equipment.

Only fees that are compulsory for every student when they enrol can be included in Training Incentive Allowance. These include tuition costs and compulsory student service fees.

Optional fees cannot be included in Training Incentive Allowance. These include penalties for late enrolment, administration charges for paying by instalment and optional service fees.

Tuition Fees, Compulsory Student Services Fees and any other expense approved by the Training Provider on the application form are acceptable evidence of those expenses.

Costs like travel, childcare, stationary, and laptops are claimed by the applicant. The applicant can enter these costs in their section of the form (page 2, question 8). Please note that the types of costs a Training Provider can include may be different from the costs the applicant can request in the form.

3. *A written statement on the extent to which training providers are required to verify course related costs that are not directly from the course provider (eg. books, childcare, equipment, transport, wi-fi.)*

Training Providers are not required to verify costs that are not directly from them. The applicant can apply for and may need to supply evidence of these costs. They can include these costs on page 2, question 8 in the application form.

4. *A written statement on how course related costs that are not directly from the course provider are expected to be recorded on the TIA application form S12 by the course provider.*

Course providers are not expected to record costs that do not directly come from them.

5. *A copy of processing standards and guidelines for applications whereby the applicant initially applied mid-year for the 52 week allowance (eg. July Year 1) and partially uses the entitlement, then the following year (eg. January Year 2) is commencing a full year course and is therefore required to pay a full year of fees to the course provider.*

Training Incentive Allowance entitlement is calculated over a 52-week period. The 52-week period starts from the date TIA starts and isn't aligned to a calendar year. Clients who have had TIA paid in the last 52-weeks, must not be paid more than the maximum amount of TIA from the date TIA was first paid until 52-weeks later i.e. 1 July to 30 June the next year.

When the client's one-off course costs and ongoing costs exceed the maximum Training Incentive Allowance payable, and the client wants to complete the course, the client is given the choice on how they would like to split the payments between one-off course costs and ongoing costs.

When Training Incentive Allowance doesn't cover the full amount, clients may also apply for a Student Loan to cover their course fees and/or course related costs.

Please refer to the following links for more information on Training Incentive Allowance payments including how to calculate your entitlement here and the processing standards addressed in question 1.

Training Incentive Allowance:

- www.workandincome.govt.nz/map/employment-and-training/specific-employment-related-assistance/training-incentive-allowance/index.html

Payment

- www.workandincome.govt.nz/map/employment-and-training/specific-employment-related-assistance/training-incentive-allowance/payment.html

52-week maximum payment

- www.workandincome.govt.nz/map/employment-and-training/specific-employment-related-assistance/training-incentive-allowance/52-week-maximum-payment.html

Costs exceed maximum

- www.workandincome.govt.nz/map/employment-and-training/specific-employment-related-assistance/training-incentive-allowance/costs-exceed-maximum.html

Example of payment for a part year eligibility

- www.workandincome.govt.nz/map/employment-and-training/specific-employment-related-assistance/training-incentive-allowance/example-payment-for-a-part-year.html

6. *Any information held, such as memos, reports and internal correspondence on any changes that have been made to the internal processing standards/guidelines since the reintroduction of the TIA in 2021.*

The processing standards included in this response have not changed since they were reintroduced in 2021. However, changes to the Training Incentive Allowance are all recorded on the following pages:

- www.workandincome.govt.nz/map/changes/map-changes-in-2021.html
- www.workandincome.govt.nz/map/changes/map-changes-in-2022.html
- www.workandincome.govt.nz/map/changes/map-changes-in-2023.html
- www.workandincome.govt.nz/map/changes/map-changes-in-2024.html

7. *Any information, such as internal memos, reports and correspondence to staff and around the cessation or extension of the TIA.*

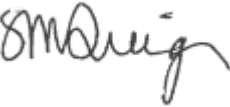
Your request for this information is very broad, and substantial manual collation would be required to locate and prepare all documents within scope of your request. As such, I refuse your request under section 18(f) of the Act. The greater public interest is in the effective and efficient administration of the public service. I have considered whether the Ministry would be able to respond to your request given extra time, or the ability to charge for the information requested. I have concluded that, in either case, the Ministry's ability to undertake its work would still be prejudiced.

I will be publishing this decision letter, with your personal details deleted, on the Ministry's website in due course.

If you wish to discuss this response with us, please feel free to contact OIA_Requests@msd.govt.nz.

If you are not satisfied with my decision on your request, you have the right to seek an investigation and review by the Ombudsman. Information about how to make a complaint is available at www.ombudsman.parliament.nz or 0800 802 602.

Ngā mihi nui

pp. 

Magnus O'Neill
General Manager
Ministerial and Executive Services

Out of scope

About Training Incentive Allowance (TIA)

Training Incentive Allowance

Training Incentive Allowance provides extra help to sole parents, carers and disabled people receiving certain types of benefits to undertake approved training and study courses that will increase their skills and opportunities for employment.

Training Incentive Allowance helps with upfront and ongoing costs associated with study (such as tuition fees, laptops, Wi-Fi, transport, and [care costs](#)).

Depending on the length of a client's study, they can claim up to the [annual maximum rate](#) in a 52-week period (but no more than weekly rate for each week of study). i.e. clients whose course of study is 20 weeks long can get the [maximum weekly amount](#) x 20 weeks. Rates are adjusted each year on 1 April.

Applications must be completed yearly, or for each individual course of study a client undertakes (i.e., those completing a 3-year degree will apply each year).

Who can get TIA?

Sole parents receiving:

- Sole Parent Support*
- Jobseeker Support (part-time study only and able to meet work obligations while studying)
- Emergency Maintenance Allowance or Emergency Benefit
- Young Parent Payment (must contact their Youth Coach)

Other eligible people:

- Supported Living Payment (HCID) – **note** client must qualify in their own right
- Supporting Living Payment – Carer

*Note: Sole parent clients don't qualify for Sole Parent Support when their youngest dependent child turns 14.

If a client studying full-time no longer qualifies for Sole Parent Support part way through their study because their youngest dependent child turns 14, there are 2 options they may consider:

1. continue full-time study and check whether they qualify for Student Allowance or Student Loan (including Student Loan living costs) – they will no longer qualify for Training Incentive Allowance under this option.
2. change to part-time study, keep getting Training Incentive Allowance, and transfer to Jobseeker Support. They must also be available for full-time work.

See: Has TIA and there's a change to their study/costs

How it's paid

Clients can choose to get TIA as a weekly amount, an upfront one-off payment, or a combination of both. It's paid as a weekly amount for ongoing costs like transport, childcare, Wi-Fi, or as an upfront payment to pay for costs like course fees, stationery, a laptop, or any other one-off expenses. These upfront payments are made to retailers, education providers, or StudyLink – so clients may need to get quotes.

One off payments can be made up to 28 days before the course start date. On-going payments start once the course has started and are paid alongside a client's regular payments in the week after study begins.

See: [TIA processing standards](#) (Doogle)

52 week maximum payment

TIA entitlement is calculated over a 52-week period. The 52-week period starts from the date TIA starts and isn't aligned to a calendar year.

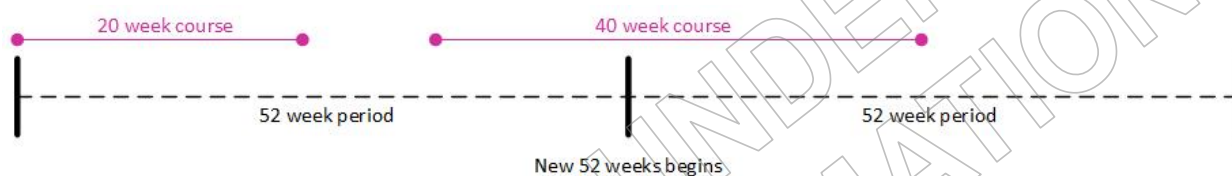
Clients who have had TIA paid in the last 52-weeks, must not be paid more than the maximum amount of TIA from the date TIA was first paid until 52-weeks later ie 1 July to 30 June the next year.

When a new 52 weeks begins that doesn't match with a client's actual study period, they may not need to submit a full application if:

- they have already applied for the same course of study (at the beginning of the current year's study period), and
- the course end date has not yet passed.

However, we might need evidence of any new costs. This is based on clients only needing to apply once every year for each course of study.

Clients who don't apply for one-off payments and are only ever granted a weekly amount will generally never exceed the 52-week maximum.



Actual and reasonable training costs

Training costs mean the client's necessary and reasonable costs of attending the course and can include, but aren't limited to:

- transport to and from the course, including car running costs where appropriate
- childcare costs (less any Childcare Assistance)
- babysitting or other child-minding costs
- care for disabled people, people with injuries or older people and other associated costs i.e. transport to the care provider (less any [other assistance](#) available)
- compulsory course fees including tuition fees and compulsory student services fees (less any Fees Free, if eligible)
- books and stationery
- laptops
- course equipment and materials
- Wi-Fi.

Full or part-time study

Eligible clients can choose to study full or part-time, unless they're a sole parent on Jobseeker Support – in which case, they may only study part-time to remain on JS and get TIA. Clients studying full or part time are both entitled to the same amount of TIA.

Benefit	Full time study	Part time study
Sole Parent Support		
Jobseeker Support (sole parent)		
Supported Living Payment (primary clients and carers)		
Emergency Maintenance Allowance		
Emergency Benefit (sole parent)		
Young Parent Payment (sole parent)		

When clients should talk to StudyLink

Clients should talk with StudyLink when:

- they're not on an eligible benefit, or don't qualify for one
- they have high costs that can't all be covered by TIA

- they want to study full-time but they're on Jobseeker Support, or Sole Parent Support with their youngest child about to turn 14 years old.

It's a good idea for clients to talk to StudyLink first – particularly if they intend to apply for course related costs. This is because the order in which they apply and are granted assistance may affect the amount they can get for their course related costs from StudyLink.

For more information see: [StudyLink Assistance](#) (Doogle)

Clients wanting to apply for TIA

Client on eligible benefit

Eligible course

Application form completed

Evidence Provided

Appointment booked

Step	Process
1.	<p>Check if the client is on an eligible benefit</p> <p>Are they getting one of the following benefits?</p> <p>Applicant needs to be a Sole parent receiving:</p> <ul style="list-style-type: none"> • Sole Parent Support • Jobseeker Support (part-time study only) • Emergency Maintenance Allowance or Emergency Benefit) • Young Parent Payment (must contact their Youth Coach) <p>Other eligible people:</p> <ul style="list-style-type: none"> • Supported Living Payment (HCID) – note client must qualify in their own right • Supporting Living Payment – Carer <p>If the client is not eligible for TIA because they do not receive a qualifying benefit, but they'd like to take up study, transfer the call to StudyLink so they can discuss their options.</p> <p>For more information see: Training Incentive Allowance section > When clients should talk to StudyLink</p>
2.	<p>Check if the course is eligible</p> <p>Courses/study must be 12 weeks or more and at levels 1-7 on the New Zealand Qualifications Framework (NZQF) and funded and approved by the Tertiary Education Commission or Ministry of Education (if secondary school). Clients will need to speak to Training Providers to confirm the study meets the criteria and the Training Provider will confirm this on the application form or in an email.</p> <p>Study must also increase a client's skills and opportunities for work and/or improve their income prospects.</p> <p>Case Managers will talk to clients about:</p> <ul style="list-style-type: none"> • their work goals • the job/role they're looking for • any skills they currently have, and • how the course improves their chances of finding employment, or getting a higher skilled job <p>For more information see: Guidelines for determining if the course will improve the client's skills for employment (Map)</p>

3.	<p>Has the client got an application form?</p> <p>If not:</p> <ul style="list-style-type: none"> • refer them to the PDF application form: Training Incentive Allowance (Work and Income website). They'll need to print it off, complete and return it. • case managers can complete an editable Training Incentive Allowance Application (Doogle) with clients over the phone, but the training provider must supply the client with all the information requested in the training provider section of the application form (pages 5 and 6). TIA cannot be processed without it. <p>Note:</p> <ul style="list-style-type: none"> • both the client and the Training Provider will need to complete the form. If the client cannot get their Training Provider to fill out their section of the application form, we can accept information via an email from the training provider. The Training Provider's email needs to include all the information asked for on the application form. • enrolment or pre-enrolment must be confirmed by the Training Provider • clients cannot apply any earlier than 28 days before their course start date • one off costs can be paid as early as 28 days before the course start date • on-going costs start after the course start date and are paid with the client's regular payments the following week • If the application is received after 28 days from the course start date, the commencement date of Training Incentive Allowance is the later of the date the application is received, or the date client's qualifying benefit commences.
4.	<p>Do they know what verification they need?</p> <p>Clients will need to provide details of their study related costs.</p> <p>These can be things like:</p> <p>Ongoing costs (like care costs, travel, and Wi-Fi)</p> <ul style="list-style-type: none"> • Online statements, confirmation of care costs from the care provider, the distance they travel and the CC rating of their car to cover petrol costs. • Note: clients enrolling their children in childcare may also need an application for Childcare Assistance – any balance of their childcare costs not covered by the subsidy can be included in TIA. <p>One-off costs (like laptops, books or other course equipment)</p> <ul style="list-style-type: none"> • Quotes, invoices, receipts, or screenshots from a retailer.
5.	<p>Book a maintenance appointment - TIA applications need to be managed by the client's service centre</p> <ul style="list-style-type: none"> • Applications ideally should be completed prior to the client's appointment • Appointments can be either face-to-face or over the phone • Include the course start date, preferred contact method and time in the appointment details. <ul style="list-style-type: none"> • Clients may be in study and unavailable at certain times i.e. because of lectures or placements. <p>Phone appointments</p> <p>The client needs to make sure they get their application form and all the supporting information to us. The case manager can complete the editable pdf application form, but the client must get their training provider to supply all the information in the training section (pages 5 and 6 of the application form) either by filling out a physical copy of the application form or emailing the required information.</p> <p>For a list of what's required see Processing standards - TIA (Doogle)</p> <p>Clients can upload this information to MyMSD (enable MyMSD document upload) or drop it off to their local service centre.</p>

Has TIA and there's a change to their study/costs

Withdrawn or has stopped attending the course

1. Ask the client the date they stopped attending
2. Suspend TIA from [the first available date](#) or the day after the client stopped attending (if it's within the current pay period)
3. Book a maintenance appointment for a case manager to follow-up

Note: clients may continue to receive TIA during short or temporary periods where they're not attending the course (when their costs continue).

Clients who do not complete their course do not have to pay back the one-off costs that have been paid for through TIA. Clients should be aware they may not be able to access TIA for 5 years if they do not have a good and sufficient reason for not completing their course.

Change in costs

1. Book a maintenance appointment for a case manager to follow-up
2. Increase in costs - ask the client to upload any supporting documents to MyMSD or drop them in at their local service centre
3. Decrease in costs - no evidence is needed.

Clients on SPS with youngest child in care turning 14

Clients whose youngest child is 14 years or older can't get SPS. Additionally, JS can't be granted to someone in full-time study.

Note: the benefit will stop on the youngest child's 14th birthday when a client is recorded as being in full-time study and receives TIA. Talk with clients about their study plans

Remaining in full-time study (no appointment needed)

- transfer the client to StudyLink to discuss student support
- leave clear notes about what you discussed with the client.

Changing to part-time study

Clients who change their study arrangements to part-time can be granted JS and receive TIA if they continue to meet their work obligations. Because clients who started their study as a full-time student will only be granted TIA until their youngest child's 14th birthday, they need their on-going entitlement to TIA reassessed until the course end date.

- book a maintenance appointment and add as much information as you can to the appointment details. ie client is changing to p/t study
- leave clear notes about what you discussed with the client

Links to more information

- [Course Participation Allowance](#) (Doogle)
- [Training Incentive Allowance](#) (Doogle)
- [Education and employment-related training](#) (Map)
- [Education and employment-related training](#) (Work and Income website)

Processing Standards - TIA

This page outlines the evidence a client needs to provide with their application for Training Incentive Allowance.

On this Page:

Accepting an application for TIA

An application form for TIA may be completed by the client and their training provider physically, or the [partially editable application \[https://doogie.ssi.govt.nz/documents/resources/helping-clients/forms-templates/work-and-income/forms/work-income/training-incentive-allowance-application-s12-interactive.pdf\]](https://doogie.ssi.govt.nz/documents/resources/helping-clients/forms-templates/work-and-income/forms/work-income/training-incentive-allowance-application-s12-interactive.pdf) can be completed (by a case manager) with the client over the phone.

Using the editable pdf form

Only the client details and information section (pages 1-4) can be completed with the client over the phone. The training details are not editable.

Clients must supply us with their course confirmation that is sourced from their Training Provider, they can do this by email or uploading the information to MyMSD. It needs to include all the relevant information that's asked for in the application form. In particular:

Confirm that the client is enrolled or pre-enrolled

Course name

Level of study (1-7)

Course start and end date

Whether they're funded by TEC or Ministry of Education

EFTS

Course fees and costs

National Student Number

If client is Fees Free eligible

It must also contain the contact details of the training provider:

Name

Phone Number

Email address

The usual processing standards apply for completing editable forms. See: [Accepting Forms \[https://doogie.ssi.govt.nz/resources/helping-clients/processing-standards/accepting-forms-01.html\]](https://doogie.ssi.govt.nz/resources/helping-clients/processing-standards/accepting-forms-01.html)

When Evidence for TIA is required – one-off costs

One-off costs are generally paid direct to a supplier. We need to be sure of the correct amount a client needs so they can pay for the item/s. You can verify the cost online without asking the client to provide a quote. An example of this would be checking a retailer's website to verify a cost.

Ensure your notes include the reason for paying the cost, the amount paid and the supplier details.

Acceptable Evidence of TIA one-off costs

Examples of acceptable evidence of study related costs are:

Receipts for expenses

Invoices

Quotes

Screen shots from an online retailer.

Tuition Fees, Compulsory Student Services Fees and any other expense approved by the Training Provider on the application form are acceptable evidence of those expenses.

Make sure all costs to be included in Training Incentive Allowance are listed in this year's training details on the application form. All evidence a client provides must be linked to a Client Event Note that details their course of study and the costs that

Training Incentive Allowance will cover.

When Evidence for TIA is required – ongoing costs

Training Incentive Allowance is for actual and reasonable study-related expenses. When a cost is reasonable you can accept the cost based on your conversation with the client. Make sure your notes include the reason for paying the cost. We don't require evidence when other assistance is verified, like the difference between Childcare Subsidy and the Childcare Centre's actual fee.

Acceptable Evidence of TIA – ongoing costs

Below are some examples of what is needed as evidence of a client's ongoing study related costs.

Cost	Description
Vehicle Running Costs	<p>Assess the reasonable running costs of a car by using the assessment that is also used for Disability Allowance [https://doogie.ssi.govt.nz/map/income-support/extra-help/disability-allowance/proof-of-transport-costs-01.html].</p> <p>You can use online resources such as Google Maps to calculate the kilometres of the client's travel using the client's home address, the address for any other necessary travel (i.e. care for their children or disabled people) and the study address.</p> <p>To check the cc rating of a vehicle you can ask the client for their licence plate or check the clients file to see if we already hold this information and enter this into websites such as www.carjam.co.nz [http://www.carjam.co.nz].</p>
Public Transport	<p>Reasonable cost of transport as advised by the client on the application form.</p> <p>Check what kind of transport they take and the route (including where they start and finish the journey). For example, the train station name. You can use websites such as www.metlink.org.nz [http://www.metlink.org.nz] or www.at.govt.nz [http://www.at.govt.nz] to check the cost of the journey. These include cash prices versus card prices.</p>
Childcare costs or informal child-minding arrangements	<p>Include the difference between Childcare Assistance and the full weekly childcare fee.</p> <p>Reasonable cost of private arrangement as advised by the client on the application form.</p>
Internet/WiFi	<p>Confirmation of cost such as an online statement that shows the client's name and frequency of the cost.</p>
Care for older people or disabled people or people with injuries	<p>Confirmation of cost from care provider (less other available assistance [https://www.health.govt.nz/your-health/services-and-support/disability-services/types-disability-support/respice/carer-support].)</p> <p>Reasonable cost of private arrangement as declared on the client's application form.</p>

Ways we can accept cost evidence

If a cost is already held on the client's file, we can accept this as evidence.

Phone

Clients can confirm their cost/s verbally
Direct contact with the supplier (with the client's permission).

Digital

MyMSD document upload
Email - you must copy the full email, including the sender, receiver, date and time details, onto the client's file

Checking a website to confirm a cost.

Face to face

Provide evidence where required at an appointment.

Content owner: [Service Delivery - Business Process Management](#) Last updated: 15 November 2021

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OFFICIAL INFORMATION ACT