

Institute of --- Advisors



Student Handbook

Institute of Advisors Pty Ltd

RTOID: 91675

Suite 213, 117 Old Pittwater Rd Brookvale NSW 2100

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Suite 213, 117 Old Pittwater Rd Brookvale NSW 2100

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WELCOME

The purpose of this Handbook is to provide you with all the information that you need to know about studying with Institute of Advisors Pty Ltd. If you have any questions, please get in touch.

STUDYING WITH INSTITUTE OF ADVISORS PTY LTD

Institute of Advisors is a Registered Training Organisation. The Institute of Advisors currently specialises in Business Advisory courses and accreditation.

Institute of Advisors understands the importance of quality training for future Business Advisors and professionals. We strive ourselves on delivering only the best and highest quality learning material to our students. Our Trainers are well experienced and dedicated to the Business Advisory industry. We put our student's needs first and ensure our students have a wonderful learning experience with us.

OUR OBLIGATIONS AS AN RTO

We offer accredited and non-accredited courses. As a Registered Training Organisation (RTO) registered with Australian Skills Quality Authority (ASQA), Institute of Advisors has an obligation to ensure the quality of the nationally recognised training and assessment we deliver. We must comply at all times with the Standards for RTOs 2015 which are part of the VET Quality Framework. To ensure compliance we have developed comprehensive internal policies, procedures and systems that guide our compliant operations and we must participate in audits with ASQA upon their request. In addition, we must ensure that any third parties that we work with who have any involvement in your training and assessment comply as well. This includes our training partners, marketing brokers and sales people where applicable.

As the RTO we have the responsibility to issue your AQF certification documents in line with our issuance policy as outlined in this Handbook.

If at any time you feel we have not met our obligations as an RTO, you have the right to make a complaint following our Complaints and Appeals Policy outlined further on in this Handbook.

CONTACT DETAILS

If you need to contact us please use these details. Your trainer/assessors contact details will be provided to you upon enrolment along with how and when you can contact them.

For general enquires	For any major matters please contact
Name: Student Support Services	Name: Peter Hickey
Phone: 02 83297977	Position: President
Email: info@instadvisors.com	Phone: 02 83297977
Hours of operation: Monday – Friday	Email: info@instadvisors.com
9am – 5pm	Hours of operation: Monday – Friday 9am – 5pm

COURSES PROVIDED BY INSTITUTE OF ADVISORS PTY LTD

Institute of Advisors offers the following courses:

CPBA CERTIFIED PROFESSIONAL BUSINESS ADVISOR

Course overview:

The Business Advisor Certification Course is an extremely practical course. You will hear advice, tips and tactics from some of the most successful Business Advisors from around the world. Unlike other online consulting courses you will be provided with and shown how to use 'best practice' methodology, strategic templates, market-leading advisory tools and advisory software to enhance the delivery of advisory services to help you build a successful practice.

You will learn how to engage clients, how to price your services and charge on value. You will be provided with sample marketing resources, brochures and consulting software so you can walk away from the course with a ready to go plan.

This course has been based on over 25 years of industry experience and includes a proven step-by-step methodology which anyone can follow!

EXIT & SUCCESSION PLANNING CERTIFICATE

(AUSTRALIAN STUDENTS - NAT10889006 Facilitate business owner exit and succession planning)

Course overview:

The purpose of this qualification is to help business advisors offer business owners exit and succession planning advice.

This course will allow business advisors to tap into the fastest growing advisory segment. This will help you to engage and offer new services to build your practice revenue

Features of the course

Self paced Interviews with successful advisors around the world 165 page client workbook – The One Page Exit Plan Forms, tools and assessments that you can use

What tools will I walk away with

- Client Discovery templates
- Business Owner Assessments including
- Business Attractiveness
- Exit Readiness
- Personal Wealth Risk and Tax
- Personal Wellness and life after exit

- One Page Planning Goals Sheet Value Enhancement Client Worksheet Step by Step practice Process template Sample Exit Plan

NAT 10889 DIPLOMA OF BUSINESS ADVISORY

Course overview:

The purpose of this qualification is to help develop a standard and learning on how to offer business advice to business owners.

Learn the skills of how to Become a Successful Business Advisor. Learn from expert advisors from around the world. The Institute of Advisors was founded by experienced Business Advisors who wanted to create a practical curriculum to increase the standards of Business Advisory around the world. The academic panel includes recognised thought leaders from around the world.

It covers the following modules.

- NAT10889001 Establish the role of a business advisor
- NAT10889002 Design a business advisory practice and engagement model
- NAT10889003 Establish effective advisory boards and client review meetings
- NAT10889004 Implement business and personal resilience strategies to help clients overcome a crisis
- NAT10889005 Provide business advisory services using business technology solutions
- NAT10889006 Facilitate business owner exit and succession planning
- BSBREL402 Build client relationships and business networking
- BSBMGT616 Develop and implement strategic plans
- BSBMGT517 Manage operational plan
- BSBWOR502 Lead and manage team effectiveness
- BSBLDR511 Develop and use emotional intelligence

SELECTION AND ENROLMENT

Institute of Advisors accepts applications from all students who meet the entry requirements published in the course information. Applications are accepted on a first come, first served basis but if a course is full, you will be offered a place in a course starting at a later date.

To apply to enrol in a course, you must complete an Enrolment Form, which may have been provided to you with this handbook, can be downloaded from our website at www.gracetraining.com.au or which you can request by emailing: info@instadvisors.com.

If you are applying for Credit you should indicate this on your enrolment and supply certified copies of your transcripts so we can assess your application for Credit. See the section on Credits in this Handbook below.

Once you have completed your enrolment form and gathered all the necessary evidence, send it to Suite 213/117 Old Pittwater Rd Brookvale NSW 2100 or email it to info@instadvisors.com

You will be contacted within 14 days to let you know the status of your application and to confirm your details.

As part of the entry requirements you will be required to attend an entry interview where you will also need to complete a language, literacy and numeracy assessment to determine that this course is suitable for you. Details of the interview will be provided at this stage.

Upon approval of your enrolment you will be sent further information about the next steps, payment arrangements and how you can get started in your course.

UNIQUE STUDENT IDENTIFIER (USI)

A Unique Student Identifier (USI) is a reference number made up of numbers and letters that creates a secure online record of the nationally recognised training completed by an individual. From 2015, all students participating in nationally recognised training must have a USI. The USI will make it easier for you to find and collate your VET achievements into a single authenticated transcript and will also ensure that your VET records are not lost.

As part of your enrolment, you must either supply your USI (if known) or provide authority for us to create or access your USI on your behalf. If you are providing the authority, you must also provide a suitable form of identification – as listed in the USI Authority Form. If you would like to create your own USI, please visit:

<http://www.usi.gov.au/Students/Pages/default.aspx>

CREDITS

A credit is formal recognition of the previous studies you have completed for the purpose of reducing the units or modules that you are required to complete in the course you are enrolled in with us.

Institute of Advisors can grant you credit towards your course for units of competency or modules that you have already completed with another RTO or authorised issuing organisation. We can also grant you Credit for subjects or units you have completed where equivalence can be established between the unit/ module in your course, and the subject or unit you have completed.

There is no charge to apply for Credit.

To apply, fill in the Credit Application Form and submit it along with your enrolment form. You can also apply for Credit at any time however it is best you do this as part of your enrolment so that Credits are known upfront and you are not required to do any work that you otherwise may not have needed to do.

Make sure you attach certified copies of transcripts from your previous study. In some cases we may ask for additional information about the subject or unit you previously studied so we can determine equivalence. Your Credit Application may be returned to you if you don't provide the required information.

In some cases, Credits may lead to a reduction in the course fees as there is less work involved in offering your course. This will be advised to you in writing.

You will be advised in writing of the outcome of your Credit Application.

RECOGNITION OF PRIOR LEARNING

Recognition of Prior Learning (RPL) is a process where skills and knowledge that you have gained through work and life experience and other unrecognised training can be formally recognised.

Institute of Advisors has a process that has been structured to minimise the time and cost to applicants and provides a supportive approach to students wishing to take up this option. You should ideally apply for RPL at the time of enrolment but you may also apply up to 2 weeks into your course.

If you think RPL is a suitable option for you, the first step is to contact your trainer/assessor or our office and have a conversation about whether or not RPL might be suitable for you. Suitability is often determined on how much experience you have in a certain area, your work history and previous training. If RPL is determined as a possibility for

you, you will be provided with a kit that will guide you in working through each unit to determine relevant skills and experience and identify whether you would be able to provide the required evidence.

A trainer/assessor will be available to assist you throughout this process.

To apply for RPL, you will need to fill in a part of the kit and return it with an RPL Application Form. Your application will then be assessed for suitability and you will then be contacted by an assessor to progress the RPL process.

From here, usually the RPL process involves gathering evidence to demonstrate skills, knowledge and experience, responding to questions, completing tasks and depending on the area, observation of your work skills in your workplace.

Fees are applicable for Recognition of Prior Learning and you will be provided with a customised quote based on your eligibility and our rates detailed below:

Recognition of Prior Learning (RPL)	
Application fee	\$200
Cost of assessment – per unit	\$150
Other units (gap training) – per unit	\$180

For more information about submitting an application for RPL, contact the head office.

COURSE LOCATIONS

All courses are online courses. On enrolment you will be provided with access to our learning portal. One of our staff will be in touch with you to ensure you can access the course and all resources. We also offer regular webinars on different content. We recommend that you take part in those live sessions.

COURSE INDUCTION

At the start of your course will be provided with an induction. The induction will provide you with specific details about your course requirements, important dates and will be an opportunity to meet your student support officer.

The induction will also provide you with important information about health and safety requirements including emergency evacuation procedures and incident reporting (see section in this handbook on health and safety), as well as a range of other important matters relating to your rights and responsibilities as a student. Note this is for courses that are not online.

The induction also provides an opportunity for you to ask any questions you might have about studying with us. During this induction, we also make sure that we have all the required forms and paperwork filled in.

At your induction you will receive your first set of learning materials so that you can start on your learning journey.

General housekeeping arrangements are also discussed as stated in the section below.

STUDENT CODE OF CONDUCT

1. Students' rights

All students have the right to:

- Be treated fairly and with respect by all students and staff.
- Learn in a supportive environment which is free from harassment, discrimination and victimisation.

- Learn in a healthy and safe environment where the risks to personal health and safety are minimised.
- Have their personal details and records kept private and secure according to our Privacy Policy.
- Access the information Institute of Advisors holds about them.
- Have their complaints and appeals dealt with fairly, promptly, confidentially and without retribution.
- Make appeals about procedural and assessment decisions.
- Receive training, assessment and support services that meet their individual needs.
- Be given clear and accurate information about their course, training and assessment arrangements and their progress.
- Access the support they need to effectively participate in their training program.
- Provide feedback to Institute of Advisors on the client services, training, assessment and support services they receive.

2. Students' responsibilities

All students, throughout their training and involvement with, Institute of Advisors Pty Ltd, are expected to:

- Treat all people with fairness and respect and not do anything that could offend, embarrass or threaten others.
- Not harass, victimise, discriminate against or disrupt others.
- Treat all others and their property with respect.
- Respect the opinions and backgrounds of others.
- Follow all safety policies and procedures as directed by staff.
- Report any perceived safety risks as they become known.
- Not bring into any premises being used for training purposes, any articles or items that may threaten the safety of self or others.
- Notify us if any of their personal or contact details change.
- Provide relevant and accurate information to Institute of Advisors in a timely manner.
- Approach their course with due personal commitment and integrity.
- Complete all assessment tasks, learning activities and assignments honestly and without plagiarism or infringing on Copyright.
- Hand in all assessment tasks, assignments and other evidence of their work with a completed and signed cover sheet.
- Make regular contact with their Trainer/Assessor.
- Prepare appropriately for all assessment tasks, visits and training sessions.
- Notify Institute of Advisors if any difficulties arise as part of their involvement in the program.
- Be punctual and professional at all times while on student work placement, including making arrangements in advance for appropriate placement hours and sticking to any arrangements made.
- Notify Institute of Advisors if they are unable to attend a training session for any reason at least 12 hours prior to the commencement of the activity.
- Make payments for their training within agreed timeframes, where relevant.
- When on work placement:
 - Ensure they arrive on time and attend according to agreed schedules.
 - Communicate and behave professionally with all staff and users of the service (including children at long day centres).
 - Dress code while on placement is black shoes, black pants and a t-shirt, however if a host workplace has another dress code, students must ensure they follow these directions instead.

COURSE EXPECTATIONS AND REQUIREMENTS

We offer accredited and non accredited courses. The accredited Diploma and modules are assessed at a higher level than the non accredited modules.

Work placement

All courses require you to work with a business client. This can be an actual client or a business owner that has agreed to you working on their business. Details of the assessment details for each course are provided on the Course Outline.

Home work

Students will also be required to ensure that they

1. Mark all videos and learning guides completed after they review them
2. That they answer all quizzes and get a minimum score of 90%
3. They must also dedicate 30 hours where they will need to complete their own research, read through the relevant chapters of their learning guides and work on necessary assessments for the cluster.

Support and work placement visits

Students will have support from their trainer/assessor via email or phone.

ASSESSMENT ARRANGEMENTS (DIPLOMA)

The training and assessment offered by Institute of Advisors focuses on providing you with knowledge and skills required to the standard of performance required in the workplace. This is known as competency based training and assessment. Each of the components of your course is a "unit of competency". You may either be studying one or a few units of competency or a set of units that make up a total qualification. Each unit of competency is linked to specific skills and knowledge required in the workplace.

Our Diploma of Business Advisory qualification is delivered holistically in clusters, where similar units have been grouped together to avoid repetition and unnecessary overlap and so that content is delivered in the most logical order. Please refer to the course outline for a listing of units and clusters in the sequence that they will be delivered.

Our course outlines include the details of how we deliver the training to you, for example, classroom based training.

For each cluster there are a number of tasks which include a variety of assessment methods including:

- Short-answer questions
- Workplace Tasks
- Research Projects
- Workplace Observation by your client

At the beginning of each unit or cluster, your assessor will go through the arrangements for assessment with you and you will be given all the details about the assessment requirements.

At this time you will:

- Be provided with detailed assessment instructions for each task/requirement which includes the criteria that you'll be assessed against.
- Be informed of relevant due dates or timing of assessments to be conducted

Your assessor will go through all of the arrangements with you and you can ask them any questions you have.

Submitting your assessments

You must submit written assessment tasks with a completed and signed Assessment Task Cover Sheet. The cover sheet asks you to make a declaration that the work is your own. Written tasks will not be accepted without a signed cover sheet.

Assessments can be submitted directly to the trainer/assessor through the online portal.

You must keep a copy of all tasks that you submit as we are not able to return copies because we must keep them as evidence in your file. Additionally, we will not be held responsible for any items that go missing. If this occurs, you will be asked to re-submit the work.

Written work will be marked within 14 days of receipt. Your assessor will provide you with written feedback and confirm the outcome of the task on the Task Cover Sheet.

Submission, feedback and re-assessment

Students must submit each task with a completed and signed Assessment Task Cover Sheet within timelines specified in the assessment plan.

Written and theoretical tasks will be assessed within 2 weeks of submission. Each task will be marked as Satisfactory or Not Satisfactory. A unit or module will be marked as Competent once all tasks for the unit or module have been marked as Satisfactory.

Students will receive detailed feedback for each task either in written or verbal form from their assessor.

Students have up to three attempts per assessment task. Where a task is marked as Not Satisfactory, the student will be provided with feedback and be given the opportunity to resubmit/re-attempt the task.

Where a student exhausts their attempts at re-assessment, the student will be withdrawn from all relevant units of competency and notified in writing.

Students may apply to re-enrol in the unit or cluster either immediately or at a later date as they see fit. Re-enrolment is charged at \$200 per unit (for training and assessment). Re-assessment (where training is not required) is charged at \$100 per unit. An additional fee of \$100 is also charged where additional workplace visits are required.

Student can only re-enrol once into each unit of competency.

Assessment appeals

Students have the right to make an appeal against an assessment decision by following the Complaints and Appeals Policy and Procedure, which is provided to all students in the Student Handbook.

Reasonable adjustment in assessment

Some students may need modifications to assessments due to disability, illness or special considerations – this is called reasonable adjustment.

Reasonable adjustment can involve:

- Making training and assessment resources and methods more accessible e.g. providing learner workbooks in an audio format or on different coloured paper.
- Adapting physical facilities, environment and/or equipment e.g. setting up hearing loops.
- Making changes to the assessment arrangements e.g. more time allowed for assessments.
- Making changes to the way evidence for assessment is gathered e.g. written questions asked orally

Please speak to your assessor if you think that you may need an adjustment made. Note these adjustments are made at the discretion of your assessor based on your identified needs.

Appealing assessment decisions

If you do not agree with any assessment decision, you can lodge an assessment appeal. Please refer to the Complaints and Appeals section in this handbook for information about how to lodge an appeal.

STUDENT PLAGIARISM, CHEATING AND COLLUSION

Institute of Advisors has a no tolerance policy for plagiarism, cheating and collusion. Students are expected to act with integrity at all times and only submit work that is their own or that has been appropriately referenced and includes acknowledgements of all resource materials used in the preparing the work.

When you submit your assessments, you will be required to sign a declaration that the work provided is your own and that you have not cheated or plagiarised the work or colluded with any other student/s.

If you are found to have plagiarised, cheated or colluded, you will be given an opportunity to respond to the allegations. If you are found to have plagiarised, cheated or colluded, we will be required to take disciplinary action which is likely to require you to complete the assessment again.

SUPPORT SERVICES

We are committed to ensuring that you get all the support you need to be successful in your studies. You may not have studied for a while and or you might need help with study skills. You may also need assistance with skills such as reading, writing and maths.

The enrolment form you complete will help us to identify any support you need and depending on the course you are enrolling in, you may also be required to complete a test that assesses your language, literacy and numeracy skills. Based on the information you provide in your enrolment and/or the results of your language, literacy and numeracy test, we will contact you to discuss your support needs.

Institute of Advisors may provide some of the following additional support, as relevant for students where a need has been identified:

- Additional one-on-one support from the trainer/assessor.
- Assigning of a mentor/coach that is able to provide additional support in the workplace and who works closely with the student and the trainer/assessor.
- Linking with additional resources in the community

Contact us to discuss your support needs.

EXTERNAL SUPPORT SERVICES

For students requiring additional support with their studies, work or life, Institute of Advisors provides the following referrals to community organisations who may be able to assist you. Please note that some of these services may attract a fee which is payable by you.

Reading and Writing Hotline

Telephone: 1300 655 506 Website: <http://www.literacyline.edu.au/index.html>

For the price of a local call anywhere in Australia, the Hotline can provide you with advice and a referral to one of 1200 providers of courses in adult literacy and numeracy.

Centrelink

Telephone: 131021 Website: www.centrelink.gov.au

If you are completing a full time course you may be eligible for benefits through Centrelink.

Australian Apprenticeship Centres (AAC)

Telephone: 1800 639 629 Website: <http://australianapprenticeships.gov.au>

Australian Apprenticeship Centres handle all matters related to traineeships and apprenticeships. If you are a trainee or apprentice, some language, literacy and numeracy courses attract government subsidies. Talk to your AAC about this now.

The Victorian Equal Opportunity & Human Rights Commission

Telephone: (03) 9281 7100 Website: <http://www.equalopportunitycommission.vic.gov.au/home.asp>

The Commission can resolve individual complaints about discrimination, sexual harassment and racial and religious vilification by offering a conciliation process that is confidential, impartial, free, and simple.

Legal Aid Victoria

Telephone: 1800 677 402 Website: <http://www.legalaid.vic.gov.au>

Victoria Legal Aid helps people with their legal problems and focuses on helping and protecting the rights of socially and economically disadvantaged Victorians. It can provide assistance in the areas criminal law, family law and some civil law matters. Legal representation is subject to policy guidelines and means tests in most cases. They have lawyers in offices in most major metropolitan and country regions.

Disability Rights Victoria

Telephone: 1800 462 480

Disability Rights Victoria is an advocacy organisation directed by people with a disability. They work with and on behalf of adults with a disability. They provide individual advocacy, information and support to people with a disability via our network of advocates located across Victoria. This support may include making representation on behalf of individuals with a disability, helping individuals to advocate for themselves or helping others to advocate for them.

Lifeline

Telephone: 13 11 14

Anyone can call Lifeline. The 13 11 14 service offers a counselling service that respects everyone's right to be heard, understood and cared for. They also provide information about other support services that are available in communities around Australia. If you feel that you might need telephone counselling, you can call about anything that might be troubling you.

Kids Help Line

Telephone: 1800 55 1800 Website: www.kidshelpline.com.au

If you're under 18 years of age you may consider contacting who provide access to telephone, web and email counselling.

Fair Work Australia

Telephone: 1300 799 675 Website: www.fwa.gov.au/index.cfm

Fair Work Australia is the national workplace relations tribunal. It is an independent body with power to carry out a range of functions relating to minimum wages, employment conditions, termination of employment and other workplace matters.

Reach Out

Website: www.reachout.com.au

Reach Out is a web-based service that inspires young people to help themselves through tough times, and find ways to boost their own mental health and wellbeing. Their aim is to improve young people's mental health and wellbeing by building skills and providing information, support and referrals in ways they know work for young people.

YOUR FEEDBACK

Your feedback is important to us and assists in ensuring that our services meet your needs. We use feedback from students and employers to contribute to our continuous improvement processes so we are always striving to do better.

We will ask you to complete surveys at the end of each cluster, and following each workplace visit to help us identify any areas for improvement.

All students and employers will be provided with a Quality Indicator Survey issued by the National Centre for Vocational Education and Research (NCVER) that they are required to complete. Please help us by completing the surveys that are provided to you by your trainer/assessor. Some may also be mailed or emailed to you from our office.

We also welcome feedback from you at any time by email and phone.

ACCESS TO YOUR RECORDS

You may access or obtain a copy of the records that Institute of Advisors holds about you at any time. This includes personal information and records of participation and progress.

If you want to access or obtain a copy of records, you must make a request in writing to the CEO using the Access to Records Request Form outlining which records you wish to access.

Access to records may be provided by:

- making copies of the records held in a file
- providing a time for you to review your file.

Amendment to records

If a student considers the information that Institute of Advisors holds about them to be incorrect, incomplete, out of date or misleading, they can request that the information be amended.

Where a record is found to be inaccurate, a correction will be made. Where a student requests that a record be amended because it is inaccurate but the record is found to be accurate, the details of the request for amendment will be noted on the record.

NOTIFYING YOU IF THINGS CHANGE

As an RTO under the VET Quality Framework, we must notify you promptly if there are any changes to our RTO, the course, or the arrangements for training and assessment. Please make sure we always have your most current home address, email address and mobile number on file so we can notify you of any changes if applicable.

Depending on the type of change, we may send a letter to your home address; send you an email. You can let us know of any changes to your details by using the Change of Details Form.

LEGISLATION AND YOU

As a student, you have both rights and responsibilities under applicable legislation.

Workplace Health and Safety

Under the Workplace Health and Safety Act 2011, Institute of Advisors must provide a safe environment for both staff and students, as well as providing information to staff and students in relation to health and safety and welfare. Institute of Advisors

has policies and procedures in place to ensure your safety and on commencement of your course you will be provided with information about health and safety.

As a student you also have a responsibility to follow instructions and rules and to behave in ways that are safe and do not endanger the health and safety of others. Always ensure that you:

- Immediately report hazards to your trainer/assessor.
- Seek assistance from a member of staff if you become ill or injured on campus.
- Only assist another person who is ill or injured if it is safe to do so. If you're not sure, call on a member of staff for assistance.
- Complete an incident report as required.
- Ensure you are familiar with Institute of Advisors emergency evacuation procedures and in the case of an emergency, follow the instructions given to you.
- Do not leave bags or personal belongings lying around where someone else could trip over them.
- Do not smoke or drink alcohol on the premises.
- Observe basic hygiene practices such as hand washing before handling and eating food and leaving toilets and wash basins clean and tidy, etc).

Harassment, victimisation or bullying

Institute of Advisors is committed to providing all people with an environment free from all forms of harassment, victimisation and bullying. Institute of Advisors will not tolerate any behaviour that harms, intimidates, threatens, victimises, offends, degrades or humiliates another person.

Anti-discrimination law defines harassment as any form of behaviour that you do not want, that offends, humiliates or intimidates you and that creates a hostile environment. Examples of harassment are making fun of someone, spreading rumours, offensive jokes, ignoring someone, etc.

Victimisation is where a person is treated unfairly because they have made a discrimination complaint.

Bullying is verbal, physical, social or psychological abuse by a staff member or student. Bullying falls under health and safety legislation.

If you at any time feel that you are being harassed, victimised or bullied by a staff member or student, you should follow these steps.

If you feel that you are being harassed, victimised or bullied, ideally you should tell the person that you don't like the behaviour and ask them to stop. However, if you are not comfortable doing this, you should lodge a complaint as per Institute of Advisors Complaints and Appeals procedure and detailed in this Handbook.

Equal opportunity

The principles and practices adopted by Institute of Advisors aim to ensure, that current and prospective students, clients and other stakeholders are treated fairly and equitably in their dealings with Institute of Advisors Pty Ltd.

All people will be treated courteously and expeditiously throughout the process of enquiry, selection and enrolment and throughout their participation in a course.

Institute of Advisors provides equity in access to the level of training and support required by each student. All students are supported in a manner that enables them to achieve their full potential and success in their training outcomes. All students are provided with opportunities to develop and successfully gain skills, knowledge and experience through education and training.

National VET Regulator Act 2011

As a student in Australia's vocational education and training (VET) sector, you should expect high-quality training in your area of interest, leading to a qualification that improves your prospects of gaining the job you want or provides a pathway to further study.

As a Registered Training Organisation registered with the Australian Skills Quality Authority, we are required to comply with the National VET Regulator Act 2011. This involves meeting a series of Standards that ensure that the training and assessment and support services are provided to you in accordance with nationally mandated standards.

Unique Student Identifier (USI)

A Unique Student Identifier (USI) is a reference number made up of numbers and letters that creates a lifetime record for an individual of all the nationally recognized training that has been completed. Under the Unique Student Identifiers Act 2014, all RTOs must ensure they have a valid USI for any student that enrolls in nationally recognised training from 2015. This means that as a student you must either:

- Provide us with your USI, or
- Provide us with permission to access or create your USI on your behalf.

If you are providing us with permission to access or create your USI we will need a valid form of identification. The ID that you provide for this purpose will be destroyed once we have used it for this purpose.

We are unable to issue a qualification or a statement of attainment unless we have a valid USI.

PRIVACY POLICY

Purpose

This policy ensures that Institute of Advisors Pty Ltd meets its legal and ethical requirements in regard to the collection, storage and disclosure of the personal information it holds in regards to individuals.

This policy and procedure contributes to compliance with Clause 8.5 of the Standards.

Definitions

ASQA means Australian Skills Quality Authority, the national VET regulator and the RTO's registering body

Personal information means 'information or an opinion about an identified individual, or an individual who is reasonably identifiable:

- 'Whether the information or opinion is true or not; and
- 'Whether the information or opinion is recorded in a material form or not.¹

Standards means the Standards for Registered Training Organisations (RTOs) 2015 from the VET Quality Framework which can be accessed at www.asqa.gov.au

Policy

1. Privacy Principles

Personal information is collected from individuals in order that Institute of Advisors Pty Ltd can carry out its business functions. Institute of Advisors Pty Ltd only collects and stores information that is directly related to its business purposes and legal requirements of providing nationally recognised training and assessment.

In collecting personal information, Institute of Advisors Pty Ltd complies with the requirements set out in the Privacy Act 1988 and the relevant privacy legislation and regulations of the states and territories in which the RTO operates.

This means Institute of Advisors Pty Ltd ensures each individual:

¹ Definition from: Australian Government. *Privacy Act 1988* (Cth). Accessed on 5th January 2014 at http://www.comlaw.gov.au/Details/C2014C00076/Html/Text#_Toc382302897

- Knows why their information is being collected, how it will be used and who it will be disclosed to.
- Is able to access their personal information upon request.
- Does not receive unwanted direct marketing.
- Can ask for personal information that is incorrect to be corrected.
- Can make a complaint about Institute of Advisors Pty Ltd if you consider that your personal information has been mishandled.

2. Collection of information

In general personal information will be collected through course application and/or enrolment forms, training records, assessment records and online forms and submissions.

The types of personal information collected include:

- personal details
- contact details
- employment information where relevant
- academic history
- statistical information about your prior education, schooling, reasons for enrolling,
- training, participation and assessment information
- fee and payment information

3. Storage and use of information

Institute of Advisors Pty Ltd will store all records containing personal information securely and take all reasonable security measures to protect the information collected from unauthorised access, misuse or disclosure. Personal information will be stored in paper-based files that are kept in a secure location locked filing and electronically in a secure environment to which only authorised staff have access.

The personal information held by individuals will only be used to enable efficient student administration, provide information about training opportunities, and to maintain accurate and detailed student records of course participation, progress and outcomes.

Institute of Advisors Pty Ltd may use the personal information provided by an individual to market other internal products and services to them. An individual may opt out of being contacted for marketing purposes at any time. Information will not be passed onto any third party marketing companies without the prior written consent of the individual.

4. Disclosure of information

The personal information about students enrolled in a Course with Institute of Advisors Pty Ltd may be shared with the Australian Government and designated authorities, such as ASQA (the RTO's registering body), and the National Centre for Vocational Education Research (NCVER). This includes personal details, contact details, course enrolment information, unit outcomes, AQF certification and statement issuance and information about training participation and progress.

Institute of Advisors Pty Ltd will not disclose an individual's personal information to another person or organisation unless:

- They are aware that information of that kind is usually passed to that person or organisation.
- The individual has given written consent.
- Institute of Advisors Pty Ltd believes on reasonable grounds that the disclosure is necessary to prevent or lessen a serious threat to the life or health of the individual concerned or another person.
- The disclosure is required or authorised by, or under, law.
- The disclosure is reasonably necessary for the enforcement of the criminal law or of a law imposing a pecuniary penalty, or for the protection of public revenue.

Any person or organisation to which information is disclosed is not permitted to use or disclose the information for a purpose other than for which the information was supplied to them.

5. Access to records

Individuals have the right to access or obtain a copy of the information that Institute of Advisors Pty Ltd holds about them including personal details, contact details and information relating to course participation, progress and AQF certification and statements of attainment issued.

Requests to access or obtain a copy of the records held about an individual must be made by contacting our office using the Request to Access Records Form. The individual must prove their identity to be able to access their records.

There is no charge for an individual to access the records that Institute of Advisors Pty Ltd holds about them; however there may be a charge for any copies made. Arrangements will be made within 10 days for the individual to access their records.

FEES, CHARGES AND REFUNDS

Purpose

1. The purpose of this policy and procedure is to outline Institute of Advisors Pty Ltd's approach to managing fees and refunds and to demonstrate how fees paid in advance are protected by Institute of Advisors Pty Ltd.
2. This complies with Clauses 5.3, 7.3 and Schedule 6 of the Standards.

Definitions

ASQA means Australian Skills Quality Authority, the national VET regulator and the RTO's registering body

Standards means the Standards for Registered Training Organisations (RTOs) 2015 from the VET Quality Framework

Policy

3. Fees and refund information

Prospective and current students are advised of the fees associated with a course on the relevant Course Outline and on the Student Agreement. In compliance with Clause 5.3 of the Standards, this is provided prior to enrolment or commencement of training, whichever is first. Fee information includes:

- All relevant fee information including fees that must be paid and payment terms
- Deposits and refund information and conditions relating to these
- The learners rights as a consumer including any cooling off period (if applicable)
- Refund information is outlined on the Student Agreement and in the Student Handbook.

4. Inclusions in course fees

Unless otherwise specified, course fees include all the training and assessment required for students to achieve the qualification or course in which they are enrolling.

No GST applies to nationally recognised training.

Course fees include electronic copies of the required text books and learning materials for each student. Any optional textbooks and materials that may be recommended but not required for a course, are not included in course fees and will be an additional cost should the student wish to purchase such materials.

Course fees for nationally accredited course include the issuance of a testamur and record of results and/or statement of attainment. For additional copies or re-issuing of any of these documents an additional fee is applicable. This fee is currently \$60 per request.

Re-enrolment is charged at \$200 per unit (for training and assessment). Re-assessment (where training is not required) is charged at \$100 per unit.

5. Credit and Recognition of Prior Learning (RPL)

There are no costs for applying for or achieving a Credit outcome against units of competency. Course fees may be reduced where student requires less training services to achieve the remaining units of competency due to achieving credit for one or more units.

Recognition of Prior Learning applications incur a \$200 application fee. Students will be provided with a quote based on units to be assessed via RPL, at a cost of \$150 per unit. Where gap training needs are identified to complete the qualification, course fees will be charged on a pro-rata per unit basis (\$180 per unit completed via training and assessment).

6. Late payments

Students who are experiencing difficulty in paying their fees are invited to call our office to make alternative arrangements for payment during their period of difficulty.

Debts will be referred to a debt collection agency where fees are more than 40 days past due. Institute of Advisors Pty Ltd reserves the right to suspend the provision of training and/or other services until fees are brought up to date. Students with long term outstanding accounts may be withdrawn from their course if payments have not been received and no alternative arrangements for payment have been made.

7. Administrative Fees (GST *inclusive*)

Resource Fees are specific to each course specified.	
Late pay tuition fee – 7 days	\$50
Late pay tuition fee – 14 days	\$75
Re-enrolment fee	\$500
Cancellation and course variation fee	\$250
RPL fee per unit	\$150
Credit transfer fee per unit	\$50
Assessment re-sit	\$250
Any official letter from Institute of Advisors	\$20
Re-issue of final documents	\$100

Commented [AC1]: I removed the admin fee because you added it in the fee breakdown

8. COURSE FEES BREAKDOWN

Enrolment fees are non-refundable.

Online course & resource fees are only debited from your account upon the release of the resources. You will receive an email confirmation with access to the online course and resources, including confirmation of the debited amount.

Assessment fee is non-refundable once you have commenced the course. Course commencement is indicated on your enrolment form.

Course	Total Fee	Enrolment fee (Non-refundable)	Online course & Resource Fee	Assessment Fee
General Payment Information	See Course schedule below	Paid upon enrolment	Debited upon release of course resources	Paid upon enrolment
General Refund Information	See schedule	Non-refundable	Non-refundable upon release of resources	Non-refundable once the course commenced
CPBA Course	\$2500	200	\$2,000	\$300
Exit & Succession Course	\$1250	150	\$1,000	\$100
Diploma of Business Advisory Course	\$5,500	200	\$4,500	\$800

Commented [AC2]: No need to schedule payments for this. If the entire 4500 is the resource fee, then it is no longer considered prepaid once they receive the resources

9. Refunds

- Details of Institute of Advisors Refund Policy are publicly available to prospective students and employers (if applicable), staff and existing students and employers (if applicable).
- Institute of Advisors will make students aware of the refund policy prior enrolment.
- With regard to all withdrawal of training, Institute of Advisors will first encourage a client to continue training or provide other options such as enrolling to another course date, prior to processing refund applications.
- All refund requests made to Institute of Advisors must be done in writing via the Refund Request Form. Institute of Advisors will only acknowledge, and review requests based on information provided through the form. Exemptions are made to mitigating circumstances, provided there is supporting evidence.
- No refunds will be issued for cancellations outside of the Refund Period.
- For refund applications within the Refund Period, the Refund Request Form must be received by Institute of Advisors, within the Refund Period. A refund of the course fee, less the applicable Administrative Fees will only be issued if all above criteria have been met and the student has no previous outstanding monies with Institute of Advisors.
- Institute of Advisors requires written notification of withdrawal from training; this may be via letter, email or the completion of the Withdrawal from Training Form. Refund will be assessed upon receipt of the request. Statement of fees that includes all fees applied and any fees refunded (if applicable) will be provided where a student withdraws from training.
- Institute of Advisors will process refund requests within 1 week from the day of receipt. The reimbursement procedure may take up to 4 weeks.
- Institute of Advisors will charge an Administration Fee of \$200 to cover administration costs.
- All refunds will be paid to the person or organisation that originally paid the fees.
- Institute of Advisors does not provide refund where:
 - (1) A client has commenced their course
 - (2) Student leaves before full course completion and does not complete qualification after assessment

(3) Recognition resources and services have been supplied to the client.

- Institute of Advisors may provide consideration for refund for students who have commenced training with the discretion of the CEO/Manager.
- Institute of Advisors does not accept liability for loss or damage suffered in the event of withdrawal from a course by a client.
- Institute of Advisors provides a full refund to all clients, should there be a need for Institute of Advisors to cancel a course. In the first instance Institute of Advisors will (where possible) provide an opportunity for the client to attend another scheduled course. If Institute of Advisors cancels a course, clients do not have to apply for a refund; Institute of Advisors will process the refunds automatically.
- Refunds for cancellation of enrolments and other conditions are granted based on the refunds table in the annex of this policy.

10.3 Recognition of prior learning

Recognition of Prior Learning (RPL)	
Application fee	\$200
Cost of assessment – per unit	\$150
Other units (gap training) – per unit	\$180

ADDITIONAL FEES AND CHARGES

These fees are charged only if required

Re-enrolment	
For training and assessment – per unit	
Re-assessment (where training is not required)	\$200
Additional workplace visits for training/assessment	\$100
	\$100
Re-issuing of testamur and statements of results	
All course fees include the cost for issuing of one copy of the course certificate (statement of attainment or qualification) and record of results.	
This fee applies to each additional copy of a certification document (statement of attainment, record of results or qualification)	\$60

COMPLAINTS AND APPEALS POLICY

Purpose

The purpose of this policy and procedure is to outline Institute of Advisors Pty Ltd's approach to managing dissatisfaction, formal complaints and appeals of students, clients, staff and other members of the community. It provides a transparent approach for all complaints and appeals to be addressed in a fair, efficient and confidential manner.

This policy and procedure ensures compliance with Standard 6 of the Standards.

Definitions

Appeal means a request for a decision made by Institute of Advisors Pty Ltd to be reviewed

Complaint means a person's formal expression of dissatisfaction with any product or service provided by Institute of Advisors Pty Ltd.

Services means training, assessment, related educational and support services and/or activities related to the recruitment of prospective learners. It does not include services such as student counselling, mediation or ICT support

Standards means the Standards for Registered Training Organisations (RTOs) 2015 from the VET Quality Framework

Policy

1. Institute of Advisors Pty Ltd responds to all allegations involving the conduct of:
 - The RTO, its trainers and assessors and other staff.
 - Any third party providing Services on behalf of Institute of Advisors Pty Ltd.
 - Any student or client of Institute of Advisors Pty Ltd.
2. Complaints may be made in relation to any of Institute of Advisors Pty Ltd's services and activities such as:
 - the application and enrolment process
 - marketing information
 - the quality of training and assessment provided
 - training and assessment matters, including student progress, student support and assessment requirements
 - the way someone has been treated
 - the actions of another student
3. Appeals should be made to request that a decision made by Institute of Advisors Pty Ltd is reviewed. Decisions may have been about:
 - course admissions
 - refund assessments
 - response to a complaint
 - assessment outcomes / results
 - other general decisions made by Institute of Advisors Pty Ltd
4. Institute of Advisors Pty Ltd is committed to developing a procedurally fair complaints and appeals process that is carried out free from bias, following the principles of natural justice. Through this policy and procedure, Institute of Advisors Pty Ltd ensures that complaints and appeals:
 - Are responded to in a consistent and transparent manner.
 - Are responded to promptly, objectively, with sensitivity and confidentiality.
 - Are able to be made at no cost to the individual.
 - Are used as an opportunity to identify potential causes of the complaint or appeal and take actions to prevent the issues from recurring as well as identifying any areas for improvement.

5. Institute of Advisors Pty Ltd will inform all persons or parties involved in any allegations made of the nature of the complaint or appeal as well as providing them with an opportunity to present their side of the matter.
6. Institute of Advisors Pty Ltd will maintain a record of all complaints and appeals and their outcomes on the Complaints and Appeals Register, which will be securely stored according to the Privacy Policy and Procedures.
7. Nothing in this policy and procedure limits the rights of an individual to take action under Australia's Consumer Protection laws and it does not circumscribe an individual's rights to pursue other legal remedies.
8. Institute of Advisors will keep all records in relation to complaints and appeals and their outcomes according to the Privacy Policy and Procedures.

Making a complaint of appeal

9. Complaints about a particular incident should be made within ninety (90) calendar days of the incident occurring and appeals must be made within thirty (30) calendar days of the original decision being made.
10. Complaints and appeals should be made in writing using the Complaints and Appeals Form, or other written format and sent to Institute of Advisors Pty Ltd's head office at 7 James Street Lang Lang VIC 3984 attention to the Chief Executive Officer.
When making a complaint or appeal, provide as much information as possible to enable Institute of Advisors Pty Ltd to investigate and determine an appropriate solution. This should include:
 - The issue you are complaining about or the decision you are appealing – describe what happened and how it affected you.
 - Any evidence you have to support your complaint or appeal.
 - Details about the steps you have already taken to resolve the issue.
 - Suggestions about how the matter might be resolved.
 - Your complaint or appeal will be acknowledged in writing.
11. The CEO of Institute of Advisors Pty Ltd will be involved in resolving complaints and appeals as outlined in the procedures.
12. Where a complaint or appeal involves another individual or organisation, they will be given the opportunity to respond to any allegations made.
13. Complaints and appeals will be finalised within thirty (30) calendar days unless there is a significant reason for the matter to take longer. In matters where additional time is needed, the complainant or appellant will be advised in writing of the reasons and will be updated weekly on the progress of the matter until such a time as the matter is resolved.
14. Where a student chooses to access this policy and procedure, Institute of Advisors Pty Ltd will maintain the student's enrolment while the complaints/appeals handling process is ongoing.

Independent Parties

15. Institute of Advisors Pty Ltd acknowledges the need for an appropriate independent party to be appointed to review a matter where this is requested by the complainant or appellant and the internal processes have failed to resolve the matter. Costs associated with independent parties to review a matter must be covered by the complainant/appellant unless the decision to include an independent party was made by Institute of Advisors Pty Ltd.
16. The independent party recommended by Institute of Advisors Pty Ltd is Melbourne Commercial Arbitration and Mediation Centre who have a cost of \$950.00 per matter, however complainants and appellants are able to use their own external party at their own cost.
 - Institute of Advisors Pty Ltd will provide complete cooperation with the external mediator investigating the complaint/appeal and will be bound by the recommendations arising out of this process.
 - The CEO will ensure that any recommendations made are implemented within twenty (20) days of being notified of the recommendations. The complainant or appellant will also be formally notified in writing of the outcome of the mediation.

External complaint avenues

17. Complaints can also be made via the following avenues:

[National Complaints Hotline:](#)

The National Training Complaints Hotline is a national service for consumers to register complaints concerning vocational education and training. The service refers consumers to the appropriate agency/authority/jurisdiction to assist with their complaint. Consumers can register a complaint with the National Training Complaints Hotline by:

- Phone: 13 38 73, Monday–Friday, 8am to 6pm nationally.
- Email: skilling@education.gov.au

For more information about the National Complaints Hotline, refer to the following webpage:

<http://www.industry.gov.au/skills/nationaltrainingcomplaintshotline/Pages/FrequentlyAskedQuestions.aspx#>

Australian Skills Quality Authority (ASQA):

Complainants may also complain to Institute of Advisors Pty Ltd's RTO's registering body: Australian Skills Quality Authority (ASQA). However, ASQA will only use the information you provide to inform its regulatory approach and will not contact us on your behalf or act as your advocate.

- Please refer to the following webpage prior to contacting ASQA: <http://www.asqa.gov.au/complaints/make-a-complaint--domestic-students/make-a-complaint--domestic-students1.html>
- To make a complaint to ASQA please refer to information here: <http://www.asqa.gov.au/complaints/make-a-complaint--domestic-students/submit-a-complaint-to-asqa.html>
- To complain you can call ASQA's info line on 1300 701 80.

AQF CERTIFICATION POLICY (ISSUING OF YOUR QUALIFICATION)

Purpose

The purpose of this policy and procedure is to outline Institute of Advisors Pty Ltd's approach to ensuring it only issues qualifications, statements of attainment and records of results to students who have completed all requirements of the program they are enrolled in.

It outlines the systems in place to ensure certification is issued correctly and only after students have fully demonstrated competence against the required units or modules.

This complies with many of the components of Standard 3 of the Standards.

Definitions

AQF means Australian Qualifications Framework which can be accessed at <http://www.aqf.edu.au/>

AQF Qualifications Issuance Policy means the national policy outlined in the AQF and available at http://www.aqf.edu.au/wp-content/uploads/2013/05/AQF_Issuance_Jan2013.pdf

ASQA means Australian Skills Quality Authority which is the national VET regulator and the RTO's registering body

Certification document means a Testamur, Statement of Attainment or Record of Results.

Course means any nationally recognised qualification, unit of competency, skill set or short course in which a student is enrolled with the RTO.

Record of Results is a record of all the units and modules completed and their results that lead to an AQF qualification or VET Accredited Course being issued and is issued alongside an AQF qualification or Statement of Attainment. Students who complete part of the requirements of an AQF qualification are entitled to receive a record of results.

Standards means the Standards for Registered Training Organisations (RTOs) 2015 from the VET Quality Framework

Statement of Attainment confirms that one or more nationally recognised units or modules has been achieved by an individual but is only used where there has been partial completion of a qualification or VET accredited course.

Student Identifier means a unique number assigned to an individual by the Registrar, in accordance with the Student Identifiers Act 2014.

Testamur is an official certification document that confirms that an AQF qualification has been awarded to an individual. This may be called an 'award', 'qualification' 'parchment', or 'certificate'.

Policy

1. In accordance with the Standards, Institute of Advisors Pty Ltd issues AQF certification documentation to students who have been assessed as meeting the requirements of a unit, module, qualification or course as specified in the relevant Training Package or VET Accredited Course.
2. All AQF certification documents issued by Institute of Advisors Pty Ltd will meet the requirements of Schedule 5 of the Standards as well as the requirements of the AQF Qualifications Issuance Policy.
3. Certification documents will be issued within 30 days of the student being assessed as meeting the requirements of the Course, providing that all fees the student owes for the Course have been paid.
4. To prevent fraudulent reproductions of its certification documents Institute of Advisors Pty Ltd:
 - Retains a register of AQF qualifications it is authorised to issue and of all AQF qualifications issued, in its student management system, VetTrak. This register also contains award numbers which can be used to verify the document.
 - Retains records of AQF certification documentation issued for a period of 30 years, on its student management system, VetTrak.

- Reports the AQF Qualifications issued to ASQA on a regular basis as required by ASQA.
 - Will not issue AQF certification documentation to an individual without being in receipt of a verified Student Identifier for that individual, unless an exemption applies under the Student Identifiers Act 2014.
 - Prints certification documentation onto paper with security features which include;
 - large text repeating over the front side of a copied document which reads 'COPY ALERT'.
 - heat sensitive ink on the reverse side which only displays when rubbed, thereby demonstrating the authenticity of the document.
 - Publishes this policy in its student handbook and on its website.
5. Student identifiers will not be included on a Statement of Attainment or a Testamur.
6. Current and past students can request a copy of their certification documents at any time. There is an additional cost of \$60 per document for re-issuance.

STUDENT FORMS

These forms are not attached to this handbook or the website, however you can request any of these forms from our office or your trainer/assessor as needed.

Name of Form	Reason for use
Marketing Permissions Form	If we want to use your picture, testimonial or other details on our marketing material (e.g. website) we will ask you to complete this.
Credit Application Form	If you want to apply for Credit Transfer
Complaints and Appeals Form	If you wish to complain about our training services, or appeal an assessment decision made
Refund Application Form	If you believe you have grounds for a refund
Enrolment Form	If you wish to apply to study with us
Participant Change of Details Form	Used to notify us if your personal details (e.g. name, contact details, address) have changed.
Withdrawal Form	If you wish to withdraw from a currently enrolled course of study.
Assessment Task Cover Sheet	Please use this when submitting assessment tasks
RPL Application Form & Candidate Kit	If you wish to apply for Recognition of Prior Learning.
Suggestion for Improvement Form	If you would like to supply us with a suggestion to improve our services
Request to Access Records Form	To request access to the information we have in your file
Amendment to Records Form	If you believe the information we have in your file is incorrect
Workplace Hazard Report	To notify us of a hazard in a workplace (where your training is taking place)
Unique Student Identifier (USI) Authority	Notifies us of your USI or allows us to request creation of a USI on your behalf

Form	(required for enrolment)
Group Workplace Enrolment Approval Form	Ensures workplaces understand and agree to terms of service (required for enrolment into a course with workplace supervision)
Individual Learning Needs Assessment Form	Helps us determine if the course is suitable for you or if you have any particular needs that may require individual support (required for enrolment).