This quick reference guide covers how to manage your course and subject enrolments in the 'My Capability - Program' student system.

Please note screenshots displayed in this document are for illustrative purposes. Actual screens may vary due to system enhancement.

This guide covers instructions on how to

- Enrol in my subjects for the Term
- Complete my electronic Commonwealth Assistant Form (eCAF) to request FEE-HELP Loan Assistance (if eligible)
- Indicate how I wish to pay for my subject enrolments and complete payment
- Find out if I need to supply my Australian Government issued Unique Student Identify (USI) to CA ANZ & how to get a USI?
- Supply my Unique Student Identify (USI) to CA ANZ
  - during enrolment
  - outside of enrolment
- Supply CA ANZ my citizenship/residency documents evidencing eligibility to request FEE-HELP Assistance
- View my Tax Invoice for my credit card payments
- View my *Commonwealth Assistance Notice(s)* (CAN) (If using FEE-HELP to cover all or part of my subject tuition fees)
- View my course progress
- View my course results
- Withdraw from a subject
- View my Personal Timetable

Subject Enrolment

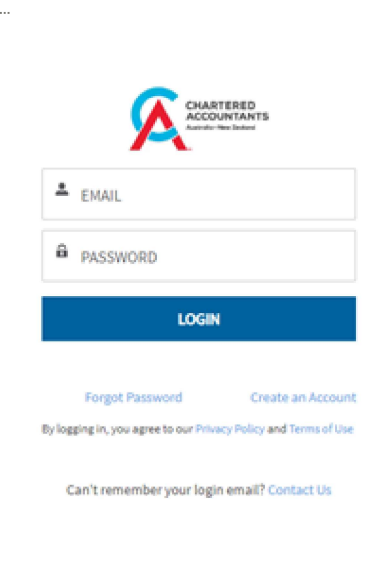- Navigate to **www.charteredaccountantsanz.com**

and

- Click on **LOGIN TO MY CA** via the top right-hand corner of the page.

Sign in with MyCA

- Log in using your email address.
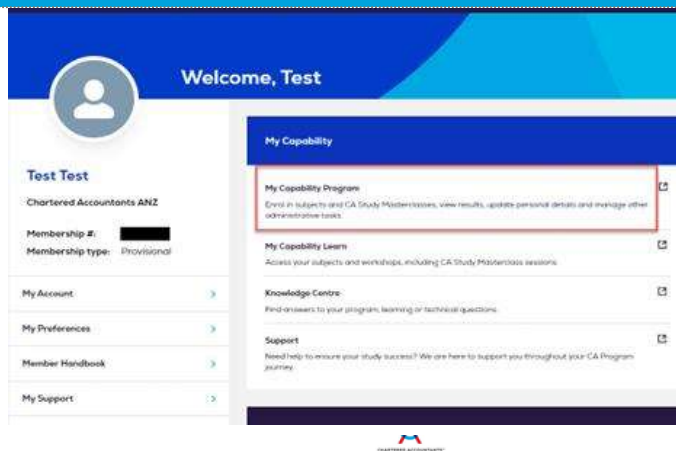- If you have forgotten your password, use the Forgot Password link.

Subject Enrolment

- Select **"My Capability"** to start the enrolment process.
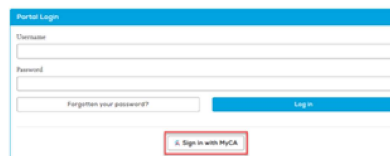- Click **"Sign in with MyCA"** [no login credentials required]

If you are having any problems logging in, contact our Member Support Team.
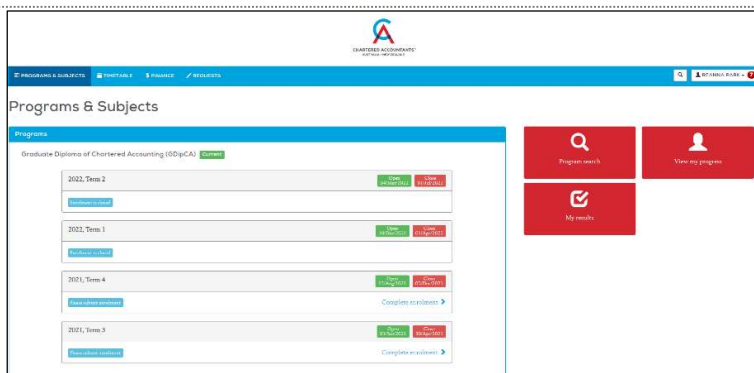
Details at:
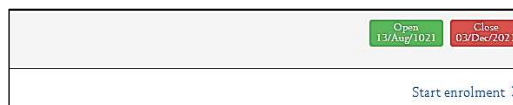https://www.charteredaccountantsanz.com/contact-us

Select your term and subjects

- Navigate to **My Capability - Program**
- Click on **"Program & Subjects"** to view the Program and Subjects page.

- To begin your subject enrolment, select the **Start Enrolment link** for the Year and Term.

You will be presented with a Summary of the information that you are required to complete to finalise your enrolment.
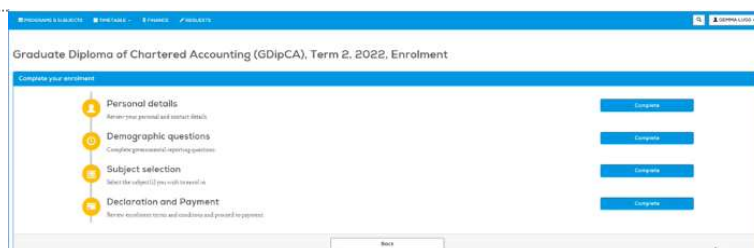
- Before you can start your enrolment you will need to click the Complete button next to Personal details to **confirm and update your address details**.

- **Check that your Personal details are complete and correct.**

  If your personal details are correct select 'Next'. If your personal details need to be updated select 'Request change', input the required change, upload your supporting documentation, and press submit.

  IMPORTANT:

  Your Legal name must at all times exactly match your name as supplied to the Australian Government for your Unique Student Identifier, if applicable. If your name changes you need to update both your CA ANZ records and USI record.

  FEE-HELP assistance applicants should note that if this information doesn't match your FEE-HELP Loan assistance request will be rejected by the Australian Government and you will remain liable to pay your course tuition fees upfront to CA ANZ by credit card or employer token (as applicable).

  Completing course candidates should note that if this information doesn't match CA ANZ is not able to graduate you from your GradDipCA course or provide your testamur and official academic statement to you.

➔ **Click here to check your personal details on the USI Registry System** *(external link)*

- Check that your **Term, Permanent Home and Mailing Address** details are complete and correct.

  If your address information is correct select 'Next'.

  Click 'Update' if your address is missing or to correct your address.

  If updating your Term or mailing address you will be directed to update your address in MyCA. If updating your Permanent Home Residential Address you will be directed to the screen shown opposite

  Note:

  Your Term Residential Address is how the system determines whether to bill you in Australian or New Zealand dollars.

  If you are applying for FEE-HELP assistance your Term and Permanent Home Address are used by the system, along with your Demographic information and other information you supply in the system, to determine your eligibility to apply for a FEE-HELP Loan.

  Upon your completion of the CA Program academic award, your official Academic Record and Testamur will be posted to the mailing address held in the system.

Initial screen displayed for verification of your legal name supplied to CA ANZ

Subject Enrolment

- Complete and check that your <u>Citizenship and Visa status</u> details are complete and correct.

  Note:

  The information you supply here will be used by the system to determine

  - the tuition fee type you are required to pay (i.e. domestic, overseas (studying in AU) or overseas (studying outside AU); and

  - whether you may be eligible to apply for FEE-HELP assistance (among other information held in the system).

  Please note: If you are a NZ citizen who holds a Special Category Visa (SCV) or prior held a SCV and have transitioned to a permanent Australian resident visa, please select the second citizenship/residency status option.

- **If requested by the system, input your Australian Government issued <u>Unique Student Identifier (USI).</u>**
  A valid USI must be input to proceed.

  Important:

  You must ensure your personal details in the Australian Government's USI Registry are up to date and match your First Name, Middle Name(s), Last Name details displayed under the 'Personal details' screen (see above). If these details do not match subsequent government verification processes. CA ANZ will request you to resubmit your USI. If your FEE-HELP application is rejected due to your USI verification processes failing , you will also be liable to pay any tuition fees upfront to CA ANZ.

  If you change your name it is your responsibility to ensure your new name is updated in both the Australian Government's USI Registry and CA ANZ MyCapability – Program student system.

This screen will not appear if you are not required to supply a USI to CA ANZ and will be pre-filled if you have prior supplied CA ANZ your USI.

Click here to find out if you need to supply an Australian Government USI to CA ANZ and how to get a USI?

- Complete and check that your Demographic details are correct and current.

  Note:

  Some of these demographic questions may seem not applicable to candidates studying the CA Program from New Zealand or other countries outside Australia, however CA ANZ is obligated to collect this requested information from all CA Program candidates as a registered Higher Education Provider under the TEQSA Act 2011 and an approved Provider of FEE-HELP under the Higher Education Support Act 2003 (HESA).

- If you have any **temporary or permanent impairment or long-term medical condition** that requires Special Provisions, select Yes and complete the disability questions presented.

Note:

If you think you're likely to be disadvantaged by a temporary or ongoing disability and/or ongoing health condition in your studies and/or assessments, depending on your circumstances, you may apply for special provisions e.g. extra time for your exams.

Special provisions aim to minimise or eliminate the impact of the disability and/or health condition while maintaining academic standards.

For further details please read the Assistance for Candidates Policy

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Subject Enrolment

- Now you are ready to commence your subject enrolment.

  This involves.

  – selecting the subjects and if applicable associated workshops that you wish to enrol in; and

  – completing payment for your enrolled subjects

  Only subjects and workshops timetabled for your program of study for the term are available for you to select.

  Click Complete next to Subject selection to select your subject enrolment(s).

- To select subjects that are open for enrolment, click on **View List** in Core Subjects.

- Navigate to the subject(s) you wish to enrol into and **click Add**

Subject	Subject details & pricing	Term & Location	Credits	Add
CACC1500	Ethics and Business	Term 3	6	Add
CACC1501	Risk and Technology	Term 3	15	Add
CACC1502	Financial Accounting and Reporting	Term 3	15	Add
CACC1503AU	Tax (AU)	Term 3	15	Add
CACC1503NZ	Tax (NZ)	Term 3	15	Add

Showing 1 to 5 of 5 entries

First | Previous | 1 | Next | Last

- If you are completing GDipCA or CASM programs scroll down and click **View List** to see a **list of available subjects**.

- Select the subjects that you wish to enrol into and click Add

CA Masters - Capstone Module

Hide List

Search

Subject	Subject details & pricing	Term & Location	Credits	Add
CAP	Capstone	Term 3	8	Add

- If subjects have associated workshops, **select your workshop preferences** 1 and 2.

- Click Save workshops to proceed.

Mode	Workshop selected?
✖	Select workshop (preference 1)
✖	Select workshop (preference 2)

No workshops required for this Subject

Save workshops

Subject Enrolment

- Supply details if you require **Special Provision.**
- Click Next to proceed.

- Select your **Time zone** and click Submit so that your workshop timetable is aligned with local time.

- Request **FEE-HELP Assistance (if eligible)**
- The system will assess whether you have applied or may be eligible to apply for FEE-HELP Assistance from the Australian Government and present you with a screen like that shown opposite depending on your circumstances.
- If you have not applied for FEE-HELP assistance the system will present a screen like those shown opposite depending on your citizenship, residency and visa status, and also course of enrolment.

Different screens depending on your citizenship, residency and visa status, and course of enrolment.

Figure 1 Example Screen only – May be eligible reflective of citizenship/residency

Figure 2 Example Screen only - May be eligible as NZ citizen with a term residential address in Australia

Note: The system defaults to permit NZ citizens with a term residential address in Australia to apply for FEE-HELP assistance if they are a holder of a New Zealand Special Category Visa (SCV) holder/ prior held a SCV and have transitioned to a permanent Australian resident visa and meet the long term Australian residency requirements and who is study the entire course while living in Australia.

Important: If you are a NZ citizen with a term residential address in Australia and do not meet these requirements DO NOT proceed to apply for an eCAF (i.e. select NO at the base of the screen)

Important

If you are presented with a screen that indicates you may be eligible to apply for FEE- HELP assistance **it is your responsibility** to ensure you read all the information on screen and you **must read the** [FEE-HELP Information Booklet.](#) This booklet contains important information about who can get a FEE-HELP Loan and how it works.

Please note: From 29 June 2023, New Zealand (NZ) citizens who formerly held a Special Category Visa (SCV) and have transitioned to a permanent resident visa on the pathway to citizenship will have continued access to the Higher Education Loan Program subject to meeting all other eligibility requirements. Our systems are currently being updated to accommodate this change. At this time, if you wish to apply for FEE-HELP assistance please proceed (you are authorised to proceed) by indicating you are a NZ SCV holder.

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*If you have determined you are **Eligible to lodge an electronic Commonwealth Assistance Application (eCAF) form** and wish to do so select YES, then click Next.*
*Please note: Once you have finalised your enrolment please ensure you upload your **evidence of eligibility for FEE-HELP Assistance** through MyCA as instructed in this How To Guide [here].*

Figure 3 Example Screen only - Ineligible reflective of citizenship/residency

If you are **Not Eligible to lodge a Commonwealth Assistance Application form** or do not wish to do so select NO, then click Next.

Figure 4 Example Screen - Ineligible as not enrolled in FEE-HELP eligible course of study

Screen 1. Information on FEE-HELP

- **Lodgement of your electronic Commonwealth Assistance Form (eCAF) to apply for FEE-HELP Assistance**

  If you are eligible to apply for FEE-HELP Assistance and selected YES at the applicable screen above you will be presented with several screens relating to 'Repaying your loan and Declarations'.

  You must ensure you read and complete all requested information on these screens before submitted your electronic Commonwealth Assistance Form (eCAF) to the Australian Government for their consideration.

Subject Enrolment

Note

It is your responsibility to ensure you read all information provided and provide all requested information.

In completing your electronic Commonwealth Assistance Form (eCAF) you are required to

1. Read the information on Requests for a FEE-HELP loan

2. Enter and/or verify you Australian Government Issued Unique Student Identifier (USI) which you input in the system

3. Confirm your USI

4. Confirm the course that you are requesting FEE-HELP Assistance for

5. Supply CA ANZ your Australian Tax File Number (TFN)

6. Note important information about requesting FEE-HELP Assistance; and

7. Complete your onscreen electronic Confirmation Assistance Form (eCAF).

Screen 2. Student Identifier Validation Confirmation

Screen 3. Unique Student Identifier (USI) Validation Confirmation

Screen 4 Confirmation of the name of the course you are requesting FEE-HELP Assistance for

Screen 5 Australian Tax File Number Input screen

Screen 6 Important information about requesting fee help assistance

Important

By completing and submitting the eCAF you are

- Confirming that you have watched the 'Request for a FEE-HELP loan' video and complete the short quiz'
- Confirming you read the FEE-HELP information booklet available at www.studyassist.gov.au. If you have not already done so you must follow the above link to read the information booklet now.
- Requesting a loan from the Australian Government that you are legally required to repay and in so doing.
- Making into legally binding declarations as set out on screen, these include but are not limited to the following declaration:
  - By submitting this eCAF, I am declaring that I agree to the following statements
  - I am requesting FEE-HELP assistance from the Commonwealth to be paid to my course provider on my behalf.
  - I have an obligation to repay through the ATO the amount that the Commonwealth has loaned me, plus the loan fee if applicable, regardless of whether I complete my studies or not, and regardless of where I live, including overseas.
  - My debt to the Commonwealth will remain if I withdraw or cancel my enrolment from my unit of study or course after the census date but my HELP balance may be re-credited by Chartered Accountants Australia and New Zealand (CA ANZ) in special circumstances. I can visit www.studyassist.gov.au for more information.
  - My FEE-HELP loan will form part of my HELP debt which will be indexed annually in line with HESA, which I also agree to repay to the Commonwealth through the ATO.
  - I must start repaying my HELP debt through the Australian tax system once my income is above a certain level (the minimum compulsory repayment threshold). The threshold is indexed annually. Repayments made through the Australian taxation system are called 'compulsory repayments'. In accordance with Chapter 4 of HESA, these repayments will continue while my income is above the compulsory repayment threshold until I have repaid my whole HELP debt, even if I have not completed my studies and regardless of whether I have moved overseas.
  - HELP debts are managed by the ATO. I can view my HELP debt, confirm my payment reference number, and view payment options online. To do so, I will need to create a myGov account and link it to the ATO's online services. I can find out how at: www.ato.gov.au/General/Online-services/Create-your-myGov-account-and-link-it-to-the-ATO.

Screen 7 electronic Confirmation Assistance Form (eCAF)

- For more information on repaying my HELP debt, I can visit www.ato.gov.au or phone 13 28 61 between 8.00 am and 6.00 pm, Monday to Friday AEST.

- **step 5 of 5 - eCAF Submission**

  By clicking "SUBMIT" you are submitting this eCAF and are requesting a loan from the Australian Government that you are legally required to repay. By clicking "SUBMIT" you are submitting this eCAF and providing a digital signature. This is the electronic and legal equivalent of your manual signature.

  Note: Giving false or misleading information is a serious offence under the Criminal Code Act 1995.

- **eCAF Submission Confirmation & receipt of PDF of your submitted eCAF**

  Having clicked "SUBMIT" at step 5 of 5 the screen shown opposite will be displayed to confirm that you have successfully lodged your request for FEE-HELP assistance.

  You can download a PDF of your submitted eCAF from this screen.

  Note: You can also download your eCAF PDF from the '$Finance' tab.

  ➜ **You can now proceed to the Declaration and Payment section to finalise your subject enrolment(s) and request FEE-HELP Assistance to cover all or part of your CA Program Graduate Diploma of Chartered Accounting subject tuition fees.**

- Click Complete for **Declaration and Payment.**

- Review the selected subjects and confirm your acceptance of the Enrolment Terms and Conditions for the Program by clicking I agree and click on **'Proceed to payment'.**
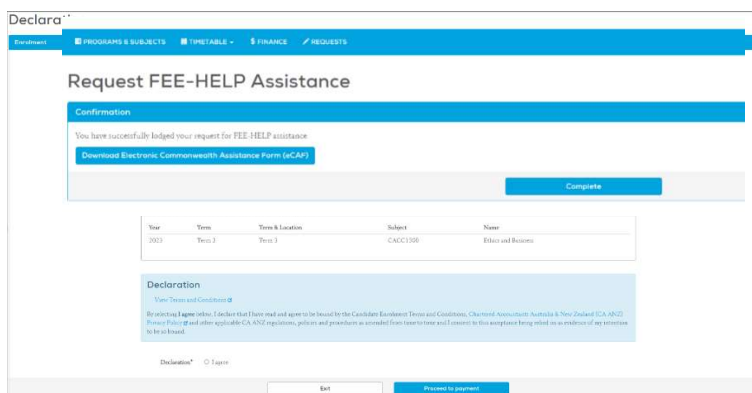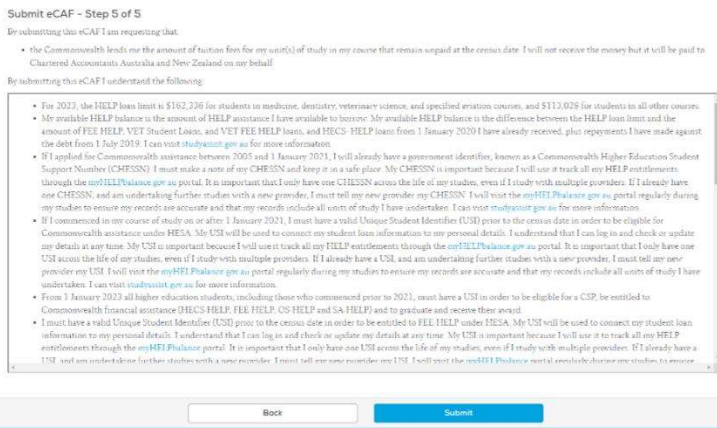
- In the **Fees -Select Payment Options** screen you will be presented with the subject(s) you have selected so you can indicate how you wish to pay for each subject.
- The system defaults to you paying for your subject enrolment(s) upfront by credit card.
- To **update your payment method**
  - o If your employer has given you an Employer Token to cover the cost of your subject enrolment(s), enter the Token number here and select the subject(s) you wish this payment method to be applied to.
  - o If you wish to cover the cost of your subjects in full or part by FEE-HELP (if eligible) you will be presented with the option to select the **Percentage (%) or enter the Amount ($) of the cost of your subject(s) you wish to cover with a FEE-HELP loan** and select the subject(s) you wish this payment method to be applied to.
  - o Select **"UPDATE"** to update the onscreen payment information to reflect your chosen payment method(s).
- Select **"Continue"** to progress to the next screen

- Review and check that your selected **payment methods** are as you have chosen.
- Select **"Continue"** to progress to the next screen.

- If you are required to make a credit card payment you will be presented with an eWay Payment screen listing the transactions that require payment.

  Select '**Click Here to Pay'**
- You will be presented with the eWay Secure Transaction Gateway payment screen. Enter your credit card payment details and select the **"Pay Now' to finalise your payment.**

  If you are not required to make a credit card payment you will be presented with an Enrolment Completion screen. Select **"Finish" to complete the enrolment process**

Subject Enrolment

- To view and download a copy of your **Tax Invoice** for your enrolments which you paid for by credit card, click on Finance and navigate to **View My invoices.**

- **CONFIRMING YOUR ENROLMENT IS COMPLETE**

  Once your enrolment has been completed and your subject tuition fees paid your enrolment status in the system will be updated immediately.

  An enrolment confirmation email will also be available in your MyCA In-tray.
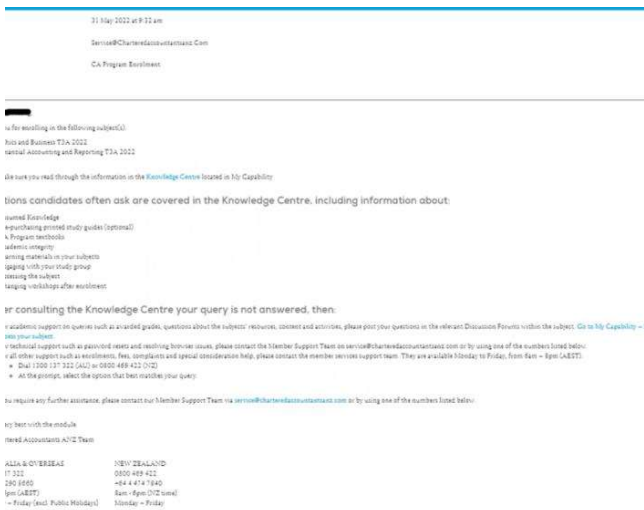
Viewing my *Commonwealth Assistance Notice (CAN)* if using FEE-HELP Assistance to cover all or part of the tuition fees of your enrolled subjects.

If you have covered any or all your subject tuition fees using FEE-HELP Assistance a Commonwealth Assistance Notice (CAN) will be provided to you within 28 days of the subject census date. It will list the units you enrolled in for that study period where you accessed a Commonwealth FEE-HELP loan. To access your CAN navigate to Finance tab.

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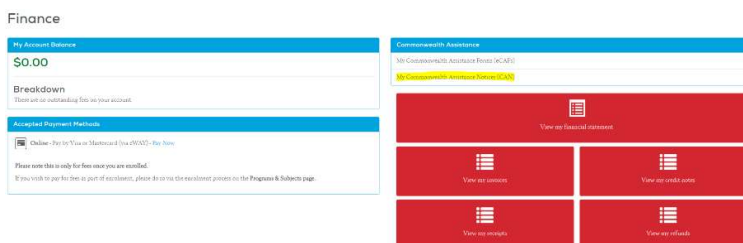
Supply and view your USI outside of enrolment

- To supply your Unique Student Identifier (USI) outside of enrolment or view your supplied USI Navigate to your My Profile screen.

- If you need to supply a USI the screen will show 'Not Supplied'. Click Add and input your Australian Government supplied 10 digit alphanumeric USI.

- If you do not need to supply a USI the screen will show 'Not Required' and display an explanatory box.

- If you have already supplied a validated USI it will be displayed (see yellow highlight) and cannot be edited.

Important:

If you are supplying your USI it is important that you ensure your personal details in the Australian Government's USI Registry are up to date and match your First Name, Last Name, and Date of Birth details displayed under the 'Personal details' screen. If these details do not match subsequent government verification processes will fail and you will be requested to resubmit your USI. If you change your name you'll need to ensure your new name is updated in both the Australian Government's USI Registry and MyCapability - Program.
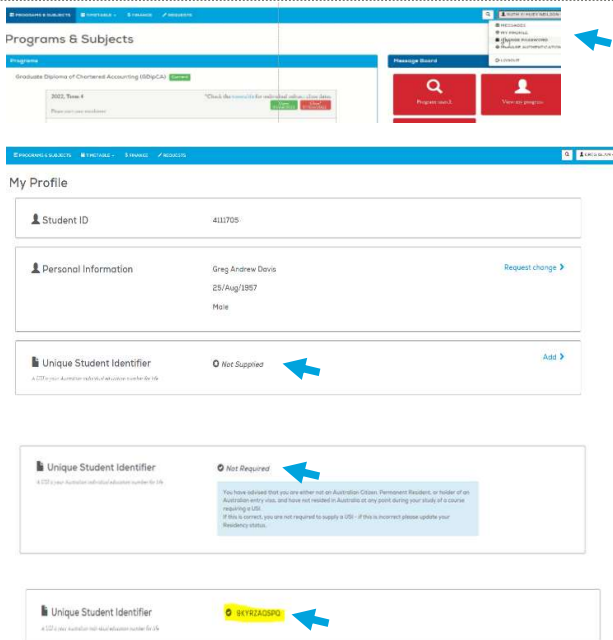
View my course progress

- To see how you are tracking with your program of study, click **View My Progress**.

- You will see the structure of the program that you are enrolled in, i.e. all the subjects the program consists of any credit points associated and the status of your subjects - Not Taken, Enrolled, Exempt etc and a snapshot of progress

Supply CA ANZ my citizenship/residency documents evidencing eligibility to request FEE-HELP Assistance

If you have applied for FEE-HELP assistance please upload your citizenship/residency evidencing your eligibility through MyCA as follows:

1. **Log into MyCA and under the 'My Support' tab select 'New Case'**. This will open the 'Create A Case' screen.

2. **In the 'Create A Case' screen** at**:**
*Type	Select 'Enrolment & Admissions'
*Sub Type	Select Citizenship/Residency
*Subject	Type "FEE-HELP eligibility evidence".
*Description	Enter the type of evidence you are uploading (e.g. copy of Passport photo page, birth certificate)

   Click on **'Add Attachment'** on the bottom left of screen and upload your Citizenship/Residency document(s)

   Select **'Submit'** to lodge your document(s) with CA ANZ.
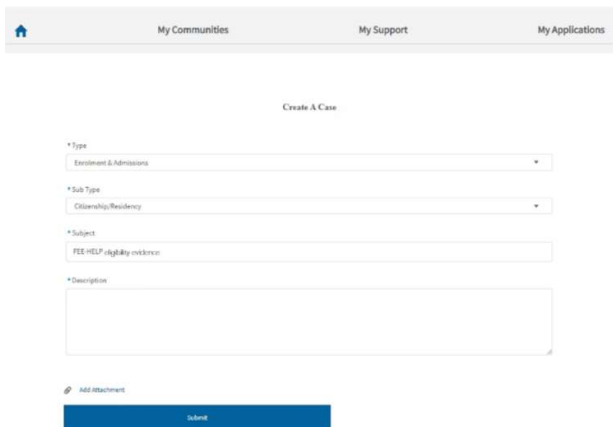
Withdraw from a Subject

- Navigate to **Program & Subjects**

- There are 2 withdrawal scenarios:

  1. **If you withdraw from a subject on or before the subject's published census date** you will no longer be liable for the subject's tuition fee and if accessing FEE-HELP no FEE-HELP debt will be incurred for the withdrawn subject. Any tuition fee amount paid upfront to CA ANZ for the withdrawn subject will be automatically refunded to the payee (including any NZ GST paid if applicable).

  2. **If you withdraw from a subject after the subject's census date** you will remain liable for the tuition fee for the subject, and if accessing FEE-HELP for the subject will incur a FEE-HELP debt. You will also incur a grade penalty as set out in the Candidate Assessment and Grading Policy and Procedure (see Grade Table). The exception is where CA ANZ has approved the candidate's post-census date withdrawal due to demonstrated Special Circumstances as set out in the Candidate Course Fees Refund Appeals and Review Policy and Procedure.

  NOTE:
  The census date for each subject is set out in the CA Program course timetable available at:
  www.charteredaccountantsanz.com/become-a-member/timetables-fees-and-enrolment

- Click on the **Withdraw** waste bin icon and select the subject you wish to withdraw from.

- The calculated **Refund % is displayed next to the subject. Select the subject and click Confirm Withdrawal.**
- Refunds will be credited back to your card or your employer will be credited if you paid by token**.**
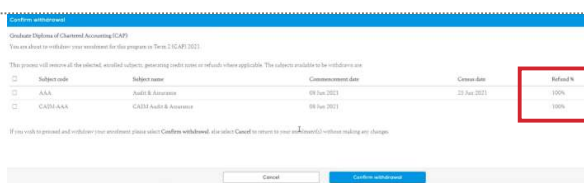
View My Personal Timetable

- If your program of study includes workshops, once details have been published, you will receive a notification and you will be able to see the workshops that you have been accepted into in Timetable.

- You can view your Group/Cohort details in **Teaching Timetable.**

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View My Course Results

- To view **historical results**, click **My Results** to review a**n Unofficial** Statement of Academic Record on Screen.

Do I need to supply CA ANZ my USI and how do I get a USI?

What is a USI?

A Unique Student Identifier (USI) is a 10 digit alpha numeric number issued by the Australian Government to an individual for life. It also creates an online record of your Australian training and education achievements.

From 1 January 2023, all higher education students, including those who commenced prior to 2021, must have a USI to:

- be eligible for a Commonwealth financial assistance (e.g. FEE-HELP)
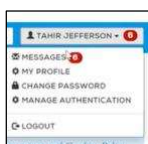
- to graduate and receive their award.

Do I need to supply a USI to CA ANZ?

If you are a CA Program candidate about to commence or currently studying your Graduate Diploma of Chartered Accounting course you may need to provide CA ANZ your USI to enrol in your course subjects. To see if you need to provide a USI look up the ready reckoner table below.

How do I get a USI?

It's easy! - you only need 5 minutes and some identification to create a USI. Get your USI now.

What if I already have a USI?

If you have undertaken vocational education and training or higher education studies in Australian in the past few years you may already have a USI. Find your USI now.

Important

If you need to supply your USI it is important that you ensure your personal details in the Australian Government's USI Registry are up to date and match your First Name, Last Name, and Date of Birth details displayed under the MyCapability - Program 'Personal details' screen. If these details do not match subsequent government verification processes will fail and you will be requested to resubmit your USI information. If you change your name you'll need to ensure your new name is updated in both the Australian Government's USI Registry and MyCapability - Program.

Further Information on the Australian Government's USI website

- www.usi.gov.au/students
- https://www.usi.gov.au/help/FAQs/general
- USI information for New Zealand, international & offshore students

USI Ready Reckoner – Use this table to see if you need to supply CA ANZ your Australian Government issued USI

About me	Australian Citizen, Permanent Resident, or holder of AU entry visa (e.g. graduate, special category, diplomatic, or other)	New Zealand Citizen, NZ Permanent Resident, or holder of NZ entry visa (e.g. graduate, diplomatic or other)	International candidates
a. I currently reside in Australia and am studying my CA Program Graduate Diploma of Chartered Accounting (GradDipCA) course	USI is required	USI is required	USI is required
b. I plan to be residing in Australia while enrolling in or studying my CA Program GradDipCA course subject(s)	USI is required	If you already have a USI please supply it to CA ANZ. If you do not have a USI, you will be required to obtain and supply CA ANZ your USI if you enter/reside in Australia while studying the CA Program's GradDipCA course. You will be able to obtain a USI once you have landed in Australia and gone through customs. You will need to use your non-Australian passport and visa as a form of ID to satisfy the Australian Government's identification requirements.	
c. I have prior resided in Australia while enrolling in or studying my CA Program GradDipCA course subject(s)	USI is required		
d. Neither (a), (b) or (c) above applies and I am not currently residing in Australia while studying my CA Program GradDipCA course	USI is required		

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