



Deferring, Transferring or Discontinuing Form

Student Name:	
Employer Name:	
Address:	
Phone:	
Email:	
Course:	
Course Start Date:	
I wish to:	
<input type="checkbox"/> Apply to defer my course studies	<input type="checkbox"/> Length of deferment? <i>(maximum 12 months only)</i>
<input type="checkbox"/> Transfer my course to another provider	<input type="checkbox"/> Reason for transfer:
<input type="checkbox"/> Withdraw from my course studies	<input type="checkbox"/> Reason for course cancellation:
Further Comments:	
Student Signature:	
Date:	

<i>Administration Use Only:</i>		
Deferral approved?	<input type="checkbox"/> Yes / <input type="checkbox"/> No	Comments:
Processing completed (see overleaf)?	<input type="checkbox"/> Yes / <input type="checkbox"/> No	
XYZ RTO Signature:		
Date:		



Participant Transferring Out	
Options provided for continuing training, which included: <ul style="list-style-type: none">referring the student to the Smart and Skilled website to identify an alternative RTO who can provide subsidised training;referring the student to the local Training Services NSW Regional Office for assistance;the student opting to remain and continue training on a “fee-for-service” basis (that is without the benefit of subsidies); orsuggesting an alternative provider.	<input type="checkbox"/> Yes
Issued an updated Training Plan listing all units of competency where an outcome has been achieved, commenced but not completed and/or not commenced	<input type="checkbox"/> Yes
Issued Statements of Attainment/Qualification credentials reflective of their actual training and assessment progress to date	<input type="checkbox"/> Yes
Returned results of any outstanding completed training activities and/or assessments to the participant	<input type="checkbox"/> Yes
If the participant is an Apprentice or Trainee, followed the process required for the change of RTO named on the Training Contract.	<input type="checkbox"/> Yes
Ensured any refunds owed were paid	<input type="checkbox"/> Yes
Provided the exiting participant a statement of fees that included all fees applied and any fees refunded, if applicable.	<input type="checkbox"/> Yes
Participant Deferring Training	
Made every effort to assist participant to continue training where possible	<input type="checkbox"/> Yes
Permitted a deferral of no more than twelve (12) months from the date of receipt of notice from the participant	<input type="checkbox"/> Yes
Advised participant of the fee implications of deferring their studies in accordance with the individual's relevant fee arrangements	<input type="checkbox"/> Yes
Confirmed with the participant that participants who do not recommence studies within a twelve (12) month period of deferral are considered to have discontinued their studies and course cancellation will occur.	<input type="checkbox"/> Yes



Discontinuing Participants	
Ascertained if the reason for discontinuing relates to the performance of XYZ RTO	<input type="checkbox"/> Yes
Ensured that reasonable efforts are made to address concerns of the participant related to the delivery and assessment of training	<input type="checkbox"/> Yes
Issued an updated Training Plan listing all units of competency where an outcome has been achieved, commenced but not completed and/or not commenced	<input type="checkbox"/> Yes
Issued Statements of Attainment/Qualification credentials reflective of their actual training and assessment progress to date	<input type="checkbox"/> Yes
Returned results of any outstanding completed training activities and/or assessments to the participant	<input type="checkbox"/> Yes
If the participant is an Apprentice or Trainee, followed the process required for the change of RTO named on the Training Contract.	<input type="checkbox"/> Yes
Ensured any refunds owed were paid	<input type="checkbox"/> Yes
Provided the exiting participant a statement of fees that included all fees applied and any fees refunded, if applicable.	<input type="checkbox"/> Yes