

Work experience

Questions:

- How many points, if any, can the applicant be awarded for skilled work experience?
- How did you make this calculation?

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Calculating application points

Questions:

- How many points have you awarded at this stage?
- Are there any claimed points that you have not awarded yet?
- What do you think needs to happen next?

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Questions:

- What instructions have not yet been met and what are the reasons for your concerns?
- What further information do you want the applicant or their employer to provide?

RELEASED UNDER THE
OFFICIAL INFORMATION ACT



NEW ZEALAND
IMMIGRATION

Skilled Migrant Category visa

Facilitator guide

RELEASED UNDER THE
OFFICIAL INFORMATION ACT



MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

New Zealand Government

This page has been left blank intentionally.

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Table of contents

Introduction	1
Preparation	2
Designation and authorisation assessment	4
How to use this guide.....	6
Course outline	7
Welcome and introduction to Skilled Migrant Category	9
Financial sustainability	21
Case study one.....	23
Review day one	35
Day Two – Sustainability workshop	36
Case study two	37
Review day two	44
Day three – Case study three.....	45
Live applications with TA – session one	55
Review day three.....	56
Day four – Live applications with TA – session two.....	57
Review day four.....	58

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Introduction

This guide prepares the facilitator to run a practical session based around case studies that build learner's knowledge.

Purpose

The purpose of this course is to deliver all topics within the Skilled Migrant Category (SMC) stream. This will be achieved by introducing the pathway attributes, application criteria, and then learning through practically applying case studies to provide an end-to-end view of the process.

Learning outcomes

At the end of this course, learners will be able to:

- explain the end-to-end process for applying and assessing an SMC application
- describe the criteria that make up an SMC application
- analyse the sustainability of a business by applying basic accounting principles when assessing an SMC application
- apply the end-to-end process when assessing an SMC application.

Audience

This course has been developed for immigration officers that will be processing applications under the SMC stream.

Course duration

Four days.

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Preparation

Prerequisites

Before undertaking this course, the learner must have completed all courses in the 'First Steps' and 'Learn your Role' parts of induction.

Availability of Technical Advisor

Before delivering this course, contact the target training site to arrange for a Technical Advisor (TA) to be available for the full duration of the course to support facilitation and to oversee the processing of live applications.

Required course resources

- Facilitator computer and projector
- Participant computers
- Pens and whiteboard markers
- Case study files (printed copies for each pair)
- One-pager Labour Market Test for Advertisements
- SMC PowerPoint (electronic version and **printed** copy for each learner)
- Unprocessed applications for session with TA on days three and four
- Sustainability
 - Learner access to two eLearning courses
 - Sustainability Facilitator Guide
 - Sustainability PowerPoint
 - Printed copy of Sustainability Ratios and Equations QRG for each learner

Preparation

- Pre-read this facilitator guide, in particular the **Facilitator topics** that can be found in the right-hand column of each lesson plan. These topics provide generic information and links to instructions to help you prepare for the sessions.

- Check all links are still working and going to the correct places. Both within this document, and the linking 'topic' documents.
- Ensure you have all of the required course resources (see above) and the list of Topic resources under each topic heading that specifies when these resources are used.

Facilitator topics

The Facilitator Topics, listed in the right-hand column of each lesson plan, are designed to help the facilitator prepare for the delivery of this course. They provide generic information as well as links to relevant information, including instructions and external websites. As you deliver the course, keep the Facilitator Topic open in the background, so that you have the links at hand when you want to demonstrate or show information on the screen to learners.

Room set-up

The room will need a screen for the facilitator to show PowerPoints and online information about SMC, a white board and enough table space for learners to be able to write and read and to use their computers. The setup should be suitable for working in pairs as well as a whole class.

Case studies

Familiarise yourself with the case studies. Each case study has a cover sheet aimed to give the facilitator guidance on how the activity questions should be answered. Facilitators have the option of covering additional case studies, over and above those covered in this guide, if they feel the learners will benefit from extra instruction.

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Designation and authorisation assessment

Designation and authorisation

For an immigration officer to be eligible to be designated and authorised, they must successfully complete all courses and assessments on the immigration officer induction programme. Your role in contributing to the triangulation of evidence for designation and authorisation assessment is detailed below.

Triangulation of evidence

An immigration officer's eligibility to be designated and authorised will be evidence based from the following sources:

- a) passing a number of self-paced knowledge assessments,
- b) observations by the learning facilitator to ensure the learner has met the learning outcomes during the 'First Steps' and 'Learn your Role' induction phases,
- c) observation and assessment by the technical advisor (TA) and learning facilitator to ensure the learner has met the learning outcomes for their specific visa pathway workshop,
- d) assessment by their direct manager as capable to perform the role.

This triangulation of evidence ensures the consistency of an immigration officer's skills, knowledge and practice from the learning process.

Learning facilitator

The learning facilitator supports the learner by:

- marking attendance on induction programme workshops. By marking attendance, the learning facilitator confirms that the learner has attended all courses and has also satisfactorily met all learning outcomes
- in collaboration with the TA, discuss and agree on the learner's overall performance in meeting the learning outcomes for their specific visa pathway
- raise any concerns with the learner's People Leader, so they can make an informed decision about what further support is needed.

Technical advisor

The technical advisor supports the learner during their role specific visa pathway learning by:

- observing the learner throughout the practical activities during the specific visa pathway workshop

- completing quality control (QC) on any live applications assessed by an IO during the specific visa pathway workshop
- in collaboration with the learning facilitator, discuss and agree on the learner's overall performance in meeting the learning outcomes for their specific visa pathway
- raise any concerns with the learner's People Leader, so they can make an informed decision about what further support is needed
- complete declaration of completion for each learner in Learn@MBIE.
Sign off is based on the learner's performance in meeting:
 1. the learning outcomes in the 'First Steps' and 'Learn your Role' induction phases *and*
 2. the learning outcomes in their specific visa pathway workshop.

The learning facilitator and technical advisor must be in agreement about a learner's overall performance in meeting the criteria for their specific visa pathway workshop in order to be suitably qualified and trained.

Confirm a time with the technical advisor to discuss each learner at the conclusion of the workshop. There is an observation and assessment guide to support this discussion. You'll find it on the Learn@INZ course page on Learn@MBIE under 'Induction guides and resources.'

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

How to use this guide

This guide sets the order and key talking points for the SMC, and is laid out as follows:

Time	Topic	Resource	Your Notes
Suggested time for each section.	Includes: <ul style="list-style-type: none"> • Instructions on how to deliver each section of the topic. • The slide number when there is a PowerPoint to be displayed. • Model answers or links to the Ops Manual 	Resources needed for each section of a topic, including the relevant PowerPoint slide.	Background information to help the facilitator prepare. Includes links to: <ul style="list-style-type: none"> • Relevant INZ information (eg Operations manual, INZ website, Verification Toolkit, etc.) • Information hosted on government websites (eg Employment NZ and Careers NZ) Includes space so the facilitator can add written notes during preparation.

How to use the SMC PowerPoint

The facilitator guide and PowerPoint slides should guide the facilitator through the delivery of this course. The slides contain:

- key points for the facilitator to talk to
- instructions for how learners can navigate to online information relating to a topic
- questions that learners need to answer on each of the case studies.

The case study questions in the PowerPoint slides do not include a corresponding immigration instruction number. The intention is that learners gain skills and confidence in finding relevant instructions. Links to immigration instructions, however, are included in this guide. This is for the facilitator's easy reference and for instances when learners need to be guided if they are having difficulty finding relevant instructions.

A printed copy of the PowerPoint slides is to be given to each learner with the idea that they will use it to write their answers to the case study questions on it.

Course outline

Time	Topic
DAY ONE 7 hrs 30 mins	
1hr 45 mins	Welcome and Introduction to Skilled Migrant Category Purpose: To understand what the SMC is the process for applying and the tools used to process applications.
1 hr	Financial sustainability online courses Purpose: To know the key things to look for when assessing whether a job offer is genuine and sustainable to perform basic equations using information from a Statement of Financial Performance to help assess the sustainability of a job offer.
4 hrs 15 mins	Case study one Purpose: To learn and practically apply the processes and procedures supporting an immigration officer deciding on SMC applications.
30 mins	Review day one Purpose: To help consolidate learning from the course so far.
DAY TWO 7 hrs 15 mins	
3hrs 50 mins	Sustainability workshop Purpose: To apply basic accounting principles to examine the liquidity situation of a business when assessing an SMC application.
3 hrs	Case study two Purpose: To practically apply the processes and procedures that supports an immigration officer to decide on SMC applications.

Time	Topic
25 mins	Review day two Purpose: To help consolidate learning from the course so far.
DAY THREE 7hrs 15 mins	
3 hrs 15 mins	Case study three Purpose: To practically apply the processes and procedures that supports an immigration officer to decide on SMC applications.
3 hrs 45mins	Live applications with TA – session one Purpose: To give the learners practical experience applying the processes and procedures that supports an immigration officer to decide on SMC applications.
15 mins	Review day three Purpose: To help consolidate learning from the course so far.
DAY FOUR 7hrs	
6 hrs 30 mins	Live applications with TA – session two Purpose: To give the learners practical experience applying the processes and procedures that supports an immigration officer to decide on SMC applications.
30 mins	Review Purpose: Review the key learning points before the course finishes.

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Welcome and introduction to Skilled Migrant Category

Topic outcomes

By the end of this topic, learners will be able to:


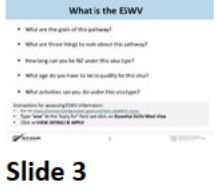
- explain the key characteristics of the Skilled Migrant Category (SMC)
- describe the process for applying for an SMC
- describe the employer responsibilities when intending to employ someone under the SMC
- list the INZ tools used to assess an SMC application
- describe the sections that make up an SMC application and the Employer Supplementary Form.


Topic resources


- Facilitator computer and projector
- Participant computers
- SMC PowerPoint
- Case study one

Lesson plan

Time	Topic	Resource	Your notes
5 mins	Course welcome and introduction Show slide 2 Tell learners: <ul style="list-style-type: none">• how the course is structured and the topics that will be covered	Printed copy of PowerPoint for each learner	Note: Suggest to learner's that as the course progresses, they save key links to external information to their favourites so that they have easy access to these throughout the course and once they are in the role.


Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> the time that you will be taking breaks (morning, lunch and afternoon tea breaks and what time the day finishes; ensure you cover this point at the beginning of each day) site specific health and safety requirements and emergency procedures Hand out the printed copy of the PowerPoints and suggest that they use it to record their answers on once we get to the case study questions. <p>Course structure and topics covered</p> <p>Use the Course Outline as a reference as you provide learners with an overview of how the course is structured and the topics that will be covered. Explain that once we start working on the case studies they will first work in pairs, and then individually once they have gained confidence.</p>		<p>Facilitator to remind learners to do this as the course progresses.</p>
20 mins	<p>What is the SMC? Organise class into pairs.</p> <p>Show slide 3</p> <p>Working in pairs, allow 10 minutes to research the questions as shown.</p> <p>Ask each pair to answer one (or more) of the questions.</p> <p>Questions</p> <p>Q. What are the goals of this pathway?</p>		<p>Note: Try and keep the discussion about 'What is the SMC' at a high level and within the time allocated. The aim of the Q&As is to give learners an overview of the SMC, including the key distinct characteristics for this category. Learners will gain more in-depth knowledge about the SMC as the course progresses.</p>


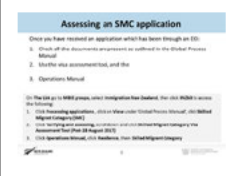
Time	Topic	Resource	Your notes
	<p>A. <i>It is a visa type that brings people with specialist skills to New Zealand to contribute to the economic growth.</i></p> <p>Q. What are three things to note about this pathway?</p> <p>A. <i>It's a points-based system to assess expressions of interest. Currently we are only selecting EOIs with 160 points or above. This visa isn't designed for people who are self-employed.</i></p> <p>Q. How long can you be in NZ under this visa type?</p> <p>A. <i>It is an indefinite pathway.</i></p> <p>Q. What age do you have to be to qualify for this visa?</p> <p>A. <i>55 years of age or under.</i></p> <p>Q. What activities can you do under this visa type?</p> <p>A. <i>Live, work, study.</i></p> <p>Instructions for accessing SMC information:</p> <ul style="list-style-type: none"> Go to https://www.immigration.govt.nz/new-zealand-visas Type "SMC" in the 'Apply for' field and click on Skilled Migrant Category Resident Visa Click on VIEW DETAILS & APPLY. 		<p>Skilled Migrant Category.</p> <p>https://www.immigration.govt.nz/new-zealand-visas/apply-for-a-visa/about-visa/skilled-migrant-category-resident-visa</p>
10 mins	<p>How does an applicant know which visa to apply for?</p> <p>Show slide 4</p> <p>Briefly speak to each method.</p> <p>Allow learners 5 minutes to navigate and explore the information about the Skilled Migrant visa on the INZ website.</p>	 <p>Slide 4</p>	<p>Job market and key industries:</p> <p>https://www.newzealandnow.govt.nz/work-in-nz/nz-jobs-industries</p>

Time	Topic	Resource	Your notes
	<p>Methods</p> <ul style="list-style-type: none"> • Approach an immigration advisor. • Call the Immigration Contact Centre (ICC) and speak with a customer services officer. • Look on the immigration website. <p>Knowing which visa to apply for:</p> <ul style="list-style-type: none"> • Go to https://www.immigration.govt.nz/new-zealand-visas • Click Work • Click 1. I'm thinking about New Zealand for work • Click job market and key industries • From the 'Skills in demand' table, click on an occupation (eg 'Engineering') • Scroll down and click Visas to work under 'visa options' • Click Skilled Migrant visa under 'Resident visas'. 		
15 mins	<p>Overview of the SMC visa application process (SM3.5)</p> <p>Show slide 5</p> <p>Briefly talk to the process chart and the note about deferring decisions (SM3.2).</p> <p>Allow learners 5 minutes to navigate and explore the information about the application process and the criteria on the INZ website.</p> <p>Discuss possible responses if an applicant applied for the wrong visa type (R5.20).</p> <p>Steps:</p>	 <p>Slide 5</p>	<p>Process steps:</p> <p>https://www.immigration.govt.nz/new-zealand-visas/apply-for-a-visa/visa-factsheet/skilled-migrant-category-resident-visa#process</p> <p>Check Criteria:</p> <p>https://www.immigration.govt.nz/new-zealand-visas/apply-for-a-visa/visa-factsheet/skilled-migrant-category-resident-visa#criteria</p>

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> 1. Submit EOI - Before submitting EOI, the applicant should check they meet requirements and calculate their points. They need at least 100 points to be accepted into the pool, though INZ is currently only selecting applicants with 160 points or more. 2. Invited to apply for Residence - EOI is put in a pool of applicants. INZ selects EOIs from the pool approximately every 2 weeks. If applicant meets SMC EOI selection threshold, they may be invited to apply (ITA) for residence. 3. Submit application for Residence - Applicants that have received an ITA, submit an 'Application for Residence under the Skilled Migrant Category' form. 4. Decision about application - This may take up to six months. If successful, they will be issued a resident visa. Check criteria tool - can be used to check specific details in relation to Nationality of passport, location where applicant made and whether the application covers other people as well. If applicant applies under the wrong visa type, responses could include advising the applicant they don't meet the criteria, advising them to consider a different application type, and applying their fee to the new visa type, through to asking them to apply for the new visa with a further fee. (Note: The response would depend on a number of factors including how much work has been done to process the application). 		

OFFICIAL INFORMATION ACT
 RELEASED UNDER THE

Time	Topic	Resource	Your notes
	<p>Instructions for accessing SMC information:</p> <ul style="list-style-type: none"> • Instructions for accessing SMC information: • Go to https://www.immigration.govt.nz/new-zealand-visas • Scroll down and type “SMC” in the ‘Find a visa factsheet’ field and click on Skilled Migrant Category. • Click on PROCESS and select a ‘Nationality on passport’ and a ‘Location when you apply’ and whether to ‘Include others on application’ and a ‘Preferred method of submission’. <p>Click VIEW PROCESS.</p>		
10 mins	<p>Employers responsibilities Show slide 6</p> <p>Provide an overview of employers’ responsibilities, including a brief explanation of the VisaView tool.</p> <p>Allow learners 5 minutes to explore the information on INZ page about employers.</p> <p>Employer responsibilities:</p> <ul style="list-style-type: none"> • checking visa status – the VisaView tool can be used to check that the person to be hired is allowed to work in New Zealand • providing evidence of a job offer • meeting rights and obligation under employment and immigration law • providing an Employer Supplementary Form, if required. <p>Instructions for accessing Employer information:</p>	 <p>Slide 6</p>	<p>Employer Responsibilities:</p> <p>https://www.immigration.govt.nz/new-zealand-visas/apply-for-a-visa/visa-factsheet/skilled-migrant-category-resident-visa#employers</p> <p>Check someone can legally work for you:</p> <p>https://www.immigration.govt.nz/employ-migrants/explore-your-options/before-you-start-hiring-migrants/check-a-candidates-visa-status</p>

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> Go to https://www.immigration.govt.nz/new-zealand-visas Type "SMC" in the 'Find a visa factsheet' field and click on Skilled Migrant Category Click on EMPLOYERS. 		
15 mins	<p>What is the difference between SMC and other visa types? Show slide 7</p> <p>Ask:</p> <ul style="list-style-type: none"> learners to use the compare tool on INZ website to compare the SMC Visa to the Essential Skills Work Visa types using the example provided. for feedback on the key findings. <p>Instructions for comparing visa types</p> <ul style="list-style-type: none"> Go to https://www.immigration.govt.nz/new-zealand-visas Click Work. Click 2. Explore visa options to work. Enter the criteria that you <i>have</i> a job offer, you're from the <i>Bahamas</i> and you're <i>35</i> years old. Click DISPAY OPTIONS Compare Skilled Migrant Category Resident Visa to Essential Skills Work Visa, and then click VIEW & COMPARE. 		<p>Explore visa options to work: https://www.immigration.govt.nz/new-zealand-visas/options/work/explore-work-visa-options</p>
10 mins	<p>How does an immigration officer assess an SMC application? Show slide 8</p> <p>Briefly explain the INZ tools used when assessing applications.</p>		<p>Global Process Manual: http://inzkit/publish/globalprocessmanual/#57-4.ht</p>

Time	Topic	Resource	Your notes
	<p>Get learners to navigate to each tool/resource so that they know how to access them.</p> <p>Tools:</p> <ul style="list-style-type: none"> • Global Process Manual • Visa Assessment Tools • Operations Manual <p>Instructions for accessing tools: On The Link go to About us, select Immigration New Zealand, click Resources then INZkit to access the following:</p> <ol style="list-style-type: none"> 1. Click Processing applications, click on View under 'Global Process Manual', click Skilled Migrant Category (SMC), then what? 2. Click Verifying and assessing, scroll down and click Skilled Migrant Category Visa Assessment Tool (Post-28 August 2017) 3. Click Operations Manual (click on INZkit to bring it up), click Residence, then Skilled Migrant Category 	Slide 8	<p>Visa Assessment Tools: http://thelink/content/inzkit/Pages/verifying-and-assessing.aspx</p> <p>Operational Manual: http://inzkit/publish/opsmanual/#6954.htm</p>
15 mins	<p>Overview of the Application Form and Employer Supplementary Form Hand out first case example. Provide an overview of the Application Form, by explaining what each section in the form is used for (further information about the sections can be found in the Application for Residence Skilled Migrant Category Guide).</p> <p>Sections:</p>	Case file one	<p>Application for Residence Guide (INZ 1105) Skilled Migrant Category: https://www.immigration.govt.nz/documents/forms-and-guides/inz1105.pdf</p> <p>Expression of Interest Guide (INZ1101) Skilled Migrant Category:</p>

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> Section A: Principal Applicant's Identity. In this section the applicant provides information about their identity as well as any previous EOI submissions. It is accompanied by proof of identity documents (Passport and/or Birth Certificate). Section B: Principal Applicant's Character. This section is to be accompanied by Police Certificates, from all countries that the applicant has lived in for 12 months or more in the last 10 years as well as from their country of origin. Section C: Principal Applicant's Health. In this section the applicant provides information and evidence about meeting ASH standards. (Refer to Health Requirements leaflet (INZ1121)). Section D: Principal Applicant's Language Ability. In this section the applicant provides information about and evidence of meeting the minimum standard of English. (Refer to English Language Information guide (INZ1060) for minimum test score requirements). Section E: Principal Applicant's Skilled Employment. In this section the applicant provides information about and evidence of skilled employment. Assessment of this section involves awarding points (according to ANSCO) for current, or an offer of, skilled employment in New Zealand (Refer to SMC EOI Guide (INZ1101)). 		https://www.immigration.govt.nz/documents/forms-and-guides/inz1101.pdf

OFFICIAL INFORMATION ACT

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> Section F: Principal Applicant's Recognised Qualifications - in this section the applicant provides information about and evidence of qualifications. Section G: Principal Applicant's Skilled Work Experience. In this section the applicant provides information about and evidence of skilled work experience outside of New Zealand. (Refer to SMC EOI Guide (INZ1101)). Section N: Principal Applicant's Children. A list of all of the applicant's children, and their partner's children, is included here. Section T: Principal Applicant's Other Family. In this section the applicant provides details for all other members of an applicant's extended family, whether they are in New Zealand or overseas. Section H: Partner's identity – If the application includes a partner, this section requires the applicant to supply information about and evidence of a genuine and stable partnership of at least 12 months with your partner. Section I to O: in these sections, the applicant provides information about and evidence of their partner's character, health, English language ability, skilled employment, and qualifications. Section P: Child's identity – in this section the applicant is required to provide information about and evidence of age and 		

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Time	Topic	Resource	Your notes
	<p>that the child is reliant on the applicant or the applicant’s partner for financial support.</p> <ul style="list-style-type: none"> • Section Q to S: In these sections the applicant provides information about and evidence of their child’s character, health, and English language ability. • Amendments: Lists any circumstances of information that has changed from EOI. • Photographs: requirement for two passport-sized photographs of each applicant. • Declaration: To be signed by applicant, any partner, and any dependent child aged between 17 and 24 years included in application. <p>Sections Employer Supplementary Form</p> <ul style="list-style-type: none"> • Section A: Employer details. To be accompanied by an employment agreement. • Section B: Position details. Details about the position offered, including ANZSCO information. • Section C: Overseas recruitment based on non-availability of New Zealand residents. To be completed unless occupation is on New Zealand skills shortage list and meets qualifications and/or work experience requirements or the person has been invited or has applied under SMC. 		

OFFICIAL INFORMATION ACT

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none">Section D: Declaration.		

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Financial sustainability

Topic outcomes

By the end of this topic, learners will be able to:

- describe the key things to look for when assessing whether a job offer is genuine and sustainable
- perform basic equations using information from a Statement of Financial Performance to help assess the sustainability of a job offer.

Topic resources

- Facilitator computer and projector
- SMC PowerPoint
- Participant computers
- Printed copy of SMC PowerPoint for each learner
- Printed copy of Sustainability ratios and equations QRG for each learner
- Access to Introduction to Financial Statements eLearning course
- Access to Statement of Financial Performance and Analysis eLearning course

Lesson plan

Time	Topic	Resource	Your Notes
55 mins	<p>Financial Sustainability online courses 1 and 2</p> <p>Explain</p> <ul style="list-style-type: none">• these online courses focus on the financial sustainability of a job offer for a newly created position; and• we will be looking at other aspects of sustainability in the workshop on Day Two. <p>Ensure learners have access to the following online courses:</p>	<p>Participant computers</p> <p>Printed copy of Sustainability ratios and equations QRG</p>	<p>Links to online courses</p> <p>Introduction to Financial Statements: Statement of Financial Performance and Analysis: https://mbihas.live.kineoplatforms.net/course/view.php?id=1073</p>

Time	Topic	Resource	Your Notes
	<ul style="list-style-type: none"> • Introduction to Financial Statements – approximately 15 minutes. • Statement of Financial Performance and Analysis - approximately 40 minutes. 	<p>for each learner</p>	<p>Note: In this session learners will individually work through the two online courses.</p> <p>The facilitator's role is to ensure all learners can access the courses and to be on hand in case they have questions.</p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Case study one

Topic outcomes

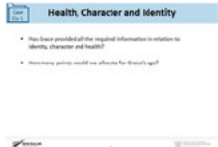
By the end of this topic, learners will be able to apply the end-to-end process when assessing an SMC application.

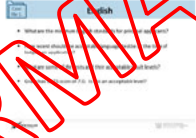
Topic resources



- Facilitator computer and projector
- Participant computers
- Whiteboard
- SMC PowerPoint
- Case study one


Lesson plan

Time	Topic	Resource	Your notes
5 mins	Introduction We are going to learn the steps for processing an SMC application by applying the topics to a number of case studies. Hand out case study one Registered Nurse Risk level – low	Case study one	Note: Ask learners, when answering questions about the case study, to summarise and pick out key points from the source information rather than quoting word-for-word, for example, from the Operations Manual.
5 mins	Risk review Explain that one of the first things you do when assessing an application is check the risk rating and then look for Alerts in AMS.		

Time	Topic	Resource	Your notes
	<p>You should check if the applicant has any previous applications.</p> <p>Risk ratings</p> <p>The first thing you should do is initiate the risk assessment to determine the risk rating. If the risk rating is higher than low, then you may need to do additional verification of some kind to mitigate it.</p>		
5 mins	<p>Check the Adviser is licenced</p> <p>Explain that applications put forward on behalf of another person by an unlicensed immigration adviser should not be accepted, unless the immigration adviser is exempt under the Immigration Advisers Licensing Act 2007 (A18).</p> <p>Show how to check that an adviser is licensed – check with INZ Advisers Authority.</p>		<p>INZ Advisers Authority</p> <p>https://iaa.ewr.govt.nz/PublicRegister/Search.aspx</p>
10 mins	<p>Identity, health and character requirements</p> <p>Show slide 9</p> <p>Ask</p> <ul style="list-style-type: none"> • What are the documents that we need to check to confirm identity? • Why we assess Health? (A4) • Why we assess Character? (A5) <p>Allow learners 5 minutes to answer the questions. Ask for a pair to answer one (or more) of the questions.</p>	 <p>Slide 9</p>	

Time	Topic	Resource	Your notes
	<p>Checking identity Check passports and birth certificate to ensure that the biographical information contained in each document is consistent.</p> <p>Questions:</p> <ul style="list-style-type: none"> • Has XXXX provided all the required information in relation to identity, character and health? • How many points would we allocate for XXXX's age? 		
20 mins	<p>English language requirements</p> <p>Ask Why we assess the English language levels of an applicant?</p> <p>Show slide 10</p> <p>In pairs, allow 15 minutes to search the Operations Manual to answer the questions.</p> <p>Ask each pair to answer one (or more) of the questions.</p> <p>Ask: Why do we assess English? (SM4.1) <i>To enable successful settlement and skilled employment in New Zealand.</i></p> <p>Questions:</p> <ul style="list-style-type: none"> • What are the minimum English standards for principal applicants? (SM4.5) 	 <p>Slide 10</p>	<p>English language requirements 'Kiwi English': https://www.newzealandnow.govt.nz/living-in-nz/english-language</p>


Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> How recent should the acceptable language test be at the time of lodging an application? (SM4.5b) What are some acceptable tests and their result levels? (SM4.5.5) Grace has IELTS score of 7.0. Is this an acceptable level? 		
35 mins	<p>ANZSCO</p> <p>Explain:</p> <ul style="list-style-type: none"> What ANZSCO is? (SM6.10). What ANZSCO is used for? (SM6.10). <p>Demonstrate:</p> <ul style="list-style-type: none"> How ANZSCO is accessed. How to use it. <p>Explain that employer and employee interviews are an invaluable way of gathering information about the employer and the job.</p> <p>Show slide 11</p> <p>In pairs, allow 5 minutes to answer the question. Ask each pair to answer one (or more) of the questions.</p> <p>Question: If the occupation is not on ANZSCO what evidence is required to access it as skilled? (SM6.10.15)</p>	 <p>Slide 11</p>	<p>ANZSCO Website: https://www.abs.gov.au/AUSSTATS/abs@.nsf/Latestproducts/1220.0Search02013,%20Version%201.2?opendocument&tabname=Summary&prodno=1220.0&issue=2013%2c%20Version%201.2&num=&view</p> <p>Telephone interview templates http://inzkit/publish/vt/#45957.htm</p>
35 mins	<p>Skilled employment</p> <p>Explain:</p> <ul style="list-style-type: none"> What a substantial match is. (SM6.10.5.1). 	 <p>Skilled Employment</p> <ul style="list-style-type: none"> What ANZSCO's view is the most relevant test? Is there a substantial match? Does the job meet the definition of skilled? Does the job require post-secondary education? Does the job require at least 3 years experience? Does the job require at least 3 years experience? 	<p>Assessing whether a job meets the definition of skilled:</p>


Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> State how the Operations Manual defines Skilled Employment. (SM6.10). Demonstrate how you would check if a job meets the definition of skilled. <p>Show slide 12</p> <p>In pairs, allow 15 minute to answer the questions. Ask each pair to answer one (or more) of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> What ANZSCO level is the role that XXXX is applying for? Is XXXXs role a substantial match? Does XXXX's role meet the definition of skilled? Does XXXX get any bonus points for her NZ work experience? (SM7.25) Does she get bonus points for skilled employment in an area of absolute skill shortage? (SM7.30) 	<p>Slide 12</p>	<p>Global Process Manual > Skilled Migrant Category > Assess > Assess Skilled employment following a JSV Deferral</p> <p>Note: This process is the same for applications without a deferral period.</p>
<p>25 mins</p>	<p>Remuneration threshold</p> <p>Ask:</p> <ul style="list-style-type: none"> What is included in remuneration and how it is calculated? (SM6.20) The rate must also meet the remuneration threshold. <p>Show slide 13</p> <p>In pairs, allow 15 minutes to answer the questions. Ask each pair to answer one (or more) of the questions.</p>	 <p>Slide 13</p>	<p>SMC Visa Assessment Tool (Post-28 August 2017):</p> <p>http://thelink/content/inzkit/Pages/verifying-and-assessing.aspx</p>

Time	Topic	Resource	Your notes
	<p>Ask:</p> <ul style="list-style-type: none"> Does XXXX's hourly rate meet the remuneration threshold? 		
10 mins	<p>Is the applicant suitably qualified for skilled employment?</p> <p>Explain:</p> <p>ANZSCO's role in assessing qualification levels and assessing whether and applicant is suitably qualified. (SM6.10.5)</p> <p>Show slide 14</p> <p>In pairs, allow 5 minutes to answer the question.</p> <p>Questions:</p> <ul style="list-style-type: none"> What would XXXX need to be qualified as a Registered Nurse? Is XXXX suitably qualified by qualification or by work experience? 	<p>Slide 14</p>	<p>ANZSCO info:</p> <p>UNIT GROUP 2544 REGISTERED NURSES</p>
40 mins	<p>Qualification level of the person</p> <p>Ask:</p> <p>What they think the purpose is for providing points for and checking an applicant's qualification level.</p> <p>Explain:</p> <ul style="list-style-type: none"> The relevance of qualifications to employment. (SM6.15) The role of NZQA and if the Qualification is not LQEA-recognised (List of Qualifications Exempt from Assessment). <p>Demonstrate how to use LQEA. (Appendix 3)</p>	<p>Slide 15</p>	<p>Note to facilitator:</p> <p>If pairs are gaining confidence in looking up instructions and answering questions, suggest that they begin to divide them up to get through the questions more quickly.</p>

Time	Topic	Resource	Your notes
	<p>Show slide 15</p> <p>In pairs, allow 20 minutes to answer the questions. Ask each pair to answer one (or more) of the questions.</p> <p>Why we provide points for and check qualifications (SM8.1) Qualifications are an indicator of ability to obtain skilled employment in New Zealand and to increase New Zealand’s capability.</p> <p>About NZQA NZQA provide (QRS) Qualification Recognition Services, they assess qualifications awarded outside of New Zealand. Determining whether overseas qualifications can be recognised in New Zealand. Then compare between the overseas qualification and the NZQF – New Zealand Qualifications Framework. It is the applicant’s responsibility to apply to the NZQA to have their qualification assessed. They provide Pre Assessment Result (PARs), normally for an EOI and for when a Skilled Migrant Application is submitted an International Qualification Assessment (IQA). See SM8.20.1 for the difference between the two reports and for what the reports are used for.</p> <p>Questions:</p> <ul style="list-style-type: none"> • What is a recognised qualification (SM8.10)? • How are points for recognised qualifications allocated (SM8.5.1) • Use the LQEA table to check: 		


OFFICIAL INFORMATION ACT

Time	Topic	Resource	Your notes
	<ol style="list-style-type: none"> 1. Bachelor (BSc) i (Biology), Aalborg Universitet Denmark"; 2007 (Y). 2. Bachelor of Arts. Shahid Beheshti University Iran, 1997 (N – outside date range). 3. Bachelor of Business, Charles Darwin University Australia, 2007 (Y). <ul style="list-style-type: none"> • What evidence is required for an overseas qualification not listed on the NZQF? (SM8.15) • What are the bonus points for qualifications earned in NZ? (SM8.25) • How many points can we award Grace for her qualification? 		
40 mins	<p>Calculating skilled work experience</p> <p>Ask: What they think the benefits of recognising work experience are</p> <p>Activity: On a whiteboard, create a timeline to show when she became suitably qualified, and how many years work experience we can recognise.</p> <p>Show slide 16</p> <p>In pairs, allow 20 minutes to answer the questions.</p> <p>Ask each pair to answer one (or more) of the questions.</p> <p>Benefits (SM7.1):</p> <ul style="list-style-type: none"> • Recognising skills and experience gained through previous work experience of the applicant. 	 <p>Slide 16</p> <p>Whiteboard</p>	

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> The work experience may qualify for additional points. Increase the applicant's ability to contribute New Zealand economically and socially. If work experience is gained in New Zealand or in an area of absolute skills shortage additional points are available for the applicant. <p><u>From the Immigration.govt.nz website:</u> 'To ensure we are attracting migrants who bring the most economic benefits to New Zealand and to improve the skill composition of people gaining residence under the Skilled Migrant category'</p> <p>Questions:</p> <ul style="list-style-type: none"> Points are calculated on the basis of every ___ complete years of skilled work experience up to a maximum of ___ years e.g. Three years of skilled work experience qualifies for ___? (SM7.5) Are there any additional requirements for skilled work experience i.e. hours worked? (SM7.20) If Grace didn't have a recognised qualification, does she have enough work experience to meet the requirements? Is Grace suitably qualified? 		
20 mins	<p>Calculating the application points</p> <p>Ask: the class why we have application points?</p> <p>Show slide 17</p> <p>In pairs, allow 10 minutes to answer the questions.</p>	 <p>Slide 17</p>	

Time	Topic	Resource	Your notes
	<p>Ask each pair to answer one (or more) of the questions.</p> <p>Aim of providing points for SMC (SM6.1)</p> <ul style="list-style-type: none"> to facilitate access by NZ employers and industry to global skills and knowledge; and to recognise that people who have skilled employment in NZ are well positioned to meet NZs needs and opportunities and more quickly achieve positive settlement outcomes. <p>Question: Does XXXX have enough application points to qualify for the Skilled Migrant Category? (SM1.10)</p>		
15 mins	<p>What happens post decision Show slide 18</p> <p>Introduce the role of the IPTLT (Immigration & Protection Tribunal Liaison Team) and the Immigration and Protection Tribunal (IPT)</p> <ul style="list-style-type: none"> The IPT deal with appeals on Residence, Deportation (resident and non-resident) and Refugee and Protection applications. <ul style="list-style-type: none"> The IPTLT liaise between the IPT, which is part of the Ministry of Justice (MOJ) and Immigration NZ. Receive an appeal and advise on validity/jurisdiction. 	<p>What happens post decision</p> <p>Immigration & Protection Tribunal Liaison Team (IPTLT) and the Immigration & Protection Tribunal (IPT)</p> <ul style="list-style-type: none"> The IPT deal with appeals on Residence, Deportation (resident and non-resident) and Refugee and Protection applications The IPTLT liaise between the IPT which is part of the Ministry of Justice (MOJ) and Immigration NZ The Immigration Research System (IRS) is a database administered by the IPTLT <p>Slide 18</p> <p>How the IPTLT can help</p> <ul style="list-style-type: none"> The IPTLT provide up to date decisions containing current instructions interpretation for reference, advice is by request IPTs are able to search decisions by different criteria including specific instructions <p>Slide 19</p>	

OFFICIAL INFORMATION ACT

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> ○ Request and organise all required files/documents for the IPT. ○ Receive and record the decision and distribute the decision. <p>Allow learners to search up the Immigration Appeals Updates (IAU) on Te Taura (the Link): Our groups/Immigration NZ/ INZkit/ Immigration Appeals Updates. The IAU is a database administered by the IPTLT and access is granted on request. The database has a library of appeal decisions made by the IPT. Options for searching appeal decisions include: Appeal type, outcome and Immigration instructions.</p> <p>Show slide 19 How the IAU can help</p> <ul style="list-style-type: none"> ● The IAU site provides up to date decisions containing current instructions interpretations, access is by request ● Able to search decisions by different criteria including specific instructions <p>Show slide 20 Useful tips:</p> <ul style="list-style-type: none"> ● Ensure the concerns outlined in the PPI letter are the same reasons upon which the decline decision is based. ● Concerns not put to the applicant must not be relied on in the final decision. 	 <p>Slide 20</p>	

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none">• If further information is requested, a PPI letter should not be sent prior to the expiry of the deadline.• Make it clear to applicants the type of evidence that INZ requires and will accept.		

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Review day one

Topic outcomes

By the end of this topic, learners will be able to recall and consolidate the learning from the course so far.

Topic resources

Whiteboard and markers

Lesson plan

Time	Topic	Resource	Your notes
30mins	<p>Use this session as an opportunity to answer any questions learners may have as a result of the day's learning.</p> <p>Do class brainstorm on their key learning points from today. You can use the following topics to help generate ideas:</p> <ul style="list-style-type: none">• ANZSCO and substantial match• Sustainability• Being suitably qualified• Qualification level of the person• Calculating skilled work experience <p>Provide an overview of tomorrow, ie after the workshop on Sustainability; we will be working on further case studies in pairs.</p>	Whiteboard and markers	

Day Two – Sustainability workshop

Topic outcomes

By the end of this topic, learners will be able to apply basic accounting principles to examine the liquidity situation of a business when assessing a Skilled Migrant Category (SMC) application.

Topic resources

- Sustainability Facilitator Guide
- Printed copy of Sustainability Ratios and Equations QRG for each learner
- Sustainability PowerPoint

Lesson plan

Time	Topic	Resource	Your notes
3 hrs 50 mins	Session to be delivered according to the Sustainability Workshop Facilitator Guide.	Sustainability Ratios and Equations QRG for each learner	

Case study two

Topic outcomes

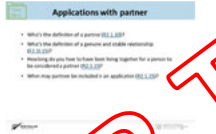

By the end of this topic, learners will be able to apply the end-to-end process when assessing an SMC application, where there is greater complexity.

Topic resources

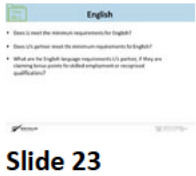
- Facilitator computer and projector
- Participant computers
- SMC PowerPoint
- Case study two

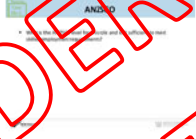

Lesson plan


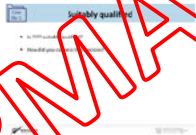

Time	Topic	Resource	Your notes
5 mins	Organise class into pairs (see Note in the Your Notes column) Hand out case study two Web administrator (with partner) Risk rating - medium	Case study two	Note: Consider reorganising your pairs so that more confident learners are paired with those that require extra support.
5 mins	Risk rating Discuss the risk rating and why this application has been given this rating.		



Time	Topic	Resource	Your notes
10 mins	<p>Applications with Partners</p> <p>Explain:</p> <ul style="list-style-type: none"> As this application has a partner, we will begin this section with generic questions about partnership. SMC applicants may be able to claim points for their partners work experience and / or qualifications. <p>Show slide 21</p> <p>Allow 5 minutes to answer the questions.</p> <p>Ask a pair to answer one (or more) of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> What's the definition of a partner? (R2.1.10) What's the definition of a genuine and stable relationship? (F2.20.15) How long do you have to have been living together for a person to be considered a partner? (R2.1.15) When may partners be included in an application? (R2.1.15) 	 <p>Slide 21</p>	
15 mins	<p>Identity, health and character requirements</p> <p>Show slide 22</p> <p>Explain:</p>	 <p>Slide 22</p>	

OFFICIAL INFORMATION ACT

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> This application has a partner as well as dependents, then the Identity, Character and Health needs to be checked for all applicants. If partners or dependents do not meet Health and Character requirements, then an application can be declined on this basis. <p>Allow learners 5 minutes to answer the questions.</p> <p>Ask for a pair to answer one (or more) of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> Has XXXX provided all the required information in relation to identity, character and health? How many points would we allocate for XXXX's age? 		
20 mins	<p>English language requirements</p> <p>Explain:</p> <p>The English language requirements for non-principal applicants (partners and dependent children aged 16 and older. SM4.10)</p> <p>Show slide 23</p> <p>Allow 10 minutes to answer the questions.</p> <p>Ask for a volunteer to answer each of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> Does XXXX meet the minimum requirements for English? Does XXXX's partner meet the minimum requirements for English? 	 <p>Slide 23</p>	<p>English language requirements 'Kiwi English':</p> <p>https://www.newzealandnow.govt.nz/living-in-nz/english-language</p>

Time	Topic	Resource	Your notes
	<p>What are the English language requirements for XXXX's partner, if they are claiming bonus points for skilled employment or recognised qualifications?</p>		
15 mins	<p>ANZSCO</p> <p>Allow 10 minutes to answer the question.</p> <p>Show slide 24</p> <p>Ask for a pair to answer the question.</p> <p>Question:</p> <p>What is the ANZSCO level for this role and is it sufficient to meet skilled employment requirements?</p>	 <p>Slide 24</p>	
20 mins	<p>Job meets the definition of skilled</p> <p>Allow 15 minutes to answer the questions.</p> <p>Show slide 25</p> <p>Ask for a volunteer to answer each of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> • Is the employment skilled? • Is the job a substantial match to ANZSCO? • Do you have enough information at this stage to make a decision? • If not what further information do you require? 	 <p>Slide 25</p>	<p>Assessing whether a job meets the definition of skilled:</p> <p>Global Process Manual > Skilled Migrant Category > Assess > Assess Skilled employment following a JSV Deferral</p> <p>Note: This process is the same for applications without a deferral period.</p>

Time	Topic	Resource	Your notes
15 mins	<p>Remuneration threshold</p> <p>Show slide 26</p> <p>Allow 10 minutes to answer the questions.</p> <p>Ask for a volunteer to answer one (or more) of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> Are you satisfied that the hourly rate meets the remuneration threshold? 	 <p>Slide 26</p>	<p>SMC Visa Assessment Tool (Post-28 August 2017):</p> <p>http://thelink/content/inkit/Pages/verifying-and-assessing.aspx</p>
15 mins	<p>Is the applicant suitably qualified for skilled employment?</p> <p>Show slide 27</p> <p>Allow 10 minutes to answer the questions.</p> <p>Ask for a pair to answer one (or more) of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> Is XXXX suitably qualified? How did you come to this decision? 	 <p>Slide 27</p>	
20 mins	<p>Qualification level of the applicant and their partner</p> <p>Explain:</p> <p>Partners can claim points for skilled employment or qualifications (SM9) if they meet the English language requirements for the principle applicant (SM9.10) and if the principal applicant and partner are in a genuine partnership.</p> <p>Show slide 28</p>	 <p>Slide 28</p>	

Time	Topic	Resource	Your notes
	<p>Allow 15 minutes to answer the questions.</p> <p>Ask for a pair to answer one (or more) of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> • How many points, if any, would you award for XXXX's qualification? (SM8.1) • Would you award any qualification points for XXXX's partner? (SM9.10) • How did you come to these decisions? 		
25 mins	<p>Calculating skilled work experience</p> <p>Show slide 29</p> <p>Allow 20 minutes to answer the questions.</p> <p>Ask for a volunteer to answer each of the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> • What instruction number refers to points claimed for the skilled work experience of a partner? (SM9) • How many points, if any, can XXXX claim for skilled employment (SM7.5)? • How did you come to these decisions? 	 <p>Slide 29</p>	
15 mins	<p>Calculating the application points</p> <p>Show slide 30</p> <p>Allow 10 minutes to answer the question.</p> <p>Ask for a pair to answer the question.</p> <p>Question:</p>	 <p>Slide 30</p>	

Time	Topic	Resource	Your notes
	Does the applicant have enough points to meet the requirements for the SMC?		

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Review day two

Topic outcomes

By the end of this topic, learners will be able to recall and consolidate the learning from the course so far.

Topic resources

Whiteboard markers

Lesson plan

Time	Topic	Resource	Your notes
25 mins	<p>Use this session as an opportunity to answer any questions they may have as a result of the day's learning.</p> <p>Do a class brainstorm on their key learnings from today.</p> <p>Provide an overview of tomorrow's learning, ie learners will begin to work on the case study activities individually, but they can ask other class members or the facilitator for guidance if they need help at any stage.</p>	Whiteboard and markers	

RELEASED UNDER THE OFFICIAL INFORMATION ACT