



## Student Handbook

For students enrolled in courses, workshops or CPD solutions with the Association of Superannuation Funds of Australia (ASFA) Limited.

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# Introduction to ASFA Learning

## Welcome

Congratulations on choosing to study with ASFA, the peak policy, research, and advocacy body for Australia's superannuation industry. We focus on the issues that affect the entire superannuation system and represent more than 90 per cent of the 14.8 million Australians with superannuation. By studying with us you are not only making an excellent investment in your future but helping us achieve our mission of continuously improving the superannuation system so people can live in retirement with increasing prosperity.

We trust you will find studying with us rewarding and incredibly valuable for your role within the superannuation industry. We also understand that many students studying with us are juggling demanding jobs and personal lives and we are here to assist and support you along the way. To this end we ask that you contact us at any time if you have any questions or need additional support during your studies.

## Key Contact Info

For all queries regarding enrolment/registration for any of our courses or assistance, please contact the ASFA Learning team

### Student Services

Monday – Friday 9am – 5pm AEST

Email: [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au)

**Mailing address:** ASFA Learning, PO Box 1485, Sydney NSW 2001

**Phone:** (02) 8079 0855 | 1800 812 798 (outside Sydney)

**Website:** [www.superannuation.asn.au](http://www.superannuation.asn.au)

## About ASFA

The Association of Superannuation Funds of Australia (ASFA) is the peak policy, research, and advocacy body for Australia's superannuation industry. We have been operating since 1962 and represent all sectors of the industry – retail funds, industry funds, corporate funds, public offer funds and service providers to the industry.

As a not-for-profit, non-political organisation, ASFA is ideally positioned to work closely and credibly with politicians, regulators, and the media.

We don't advocate one sector's interests over the other. Rather we analyse the system as a whole and focus on developing policy that enhances the financial security and retirement income of all Australians and builds the credibility of the industry as a whole.

### *Our vision*

To ensure all Australians are financially confident about their retirement.

### *Our mission*

To continuously improve the super system, so all Australians can enjoy a comfortable and dignified retirement.

### *Our purpose*

To help achieve the best retirement outcomes for members of superannuation funds through the development of good public policy and industry best practice.

## Why study with ASFA Learning

ASFA Learning is a leading provider of nationally recognised superannuation training and a Registered Training Organisation (RTO). Courses range from the basics of super, right through to advanced governance and trustee courses. Most courses are offered in a variety of formats including flexible online, virtual workshops, or face-to-face workshops. Customised training solutions are also available, allowing member organisations to design training that suits their unique needs. ASFA Learning works with some of the industry's most respected organisations to train their staff via corporate workshops and customised training solutions.

Decades of experience in superannuation, training, education, and compliance, as well as a strong strategic focus developing agile digital products, allows ASFA Learning to provide a best-in-class learning experience. ASFA's policy and research teams alone bring over 250 years' experience in superannuation, policymaking, investment, financial services, SMSFs, taxation and regulation.

## ASFA's RTO Status

ASFA is a registered training organisation (RTO) regulated by the Australian Skills Quality Authority (ASQA), under the *Australian Vocational Education and Training Regulator Act 2011*. ASFA is registered to deliver Vocational Education and Training (VET) training, conduct assessment and issue nationally recognised Australian Qualifications Framework (AQF) qualifications and statements of attainment. This involves complying with the VET Quality Framework, including the *Standards for Registered Training Organisation's (RTO's) 2015* (Standards), that ensure that the training and assessment and support services provided to you are in accordance with nationally mandated standards. You can view ASFA's RTO registration, as well as the scope of qualifications that ASFA can deliver, at <http://www.training.gov.au>. The National RTO Code Number for the Association of Superannuation Funds of Australia (ASFA) Limited is 90755.

## ASFA's Courses, Workshops and Continuing Professional Development (CPD) solutions

ASFA Learning offer a range of VET courses, non-VET courses and workshops, and CPD solutions for people at all stages of their superannuation careers.

### ASFA VET courses

VET courses are nationally recognised under the Australian Qualifications Framework (AQF) and focus on the skills and competencies required for a specific job:

- FNS40920 Certificate IV in Superannuation

### ASFA Non-VET courses and workshops

Building on the expertise of ASFA's research and policy teams, our non-VET courses are designed to provide superannuation specific knowledge and skills for people at all stages of their careers. These courses are recognised throughout Australia and provide ASFA CPD points upon completion.

- RG 146 Superannuation
- RG 146 Superannuation Refresher
- General Advice Skills Program
- Factual Information vs Financial Product Advice
- Super Industry Update
- Super Essentials

- Super Professional Series
- Superannuation Governance Masterclass
- RG 271 Member-Focused Complaints Handling Program

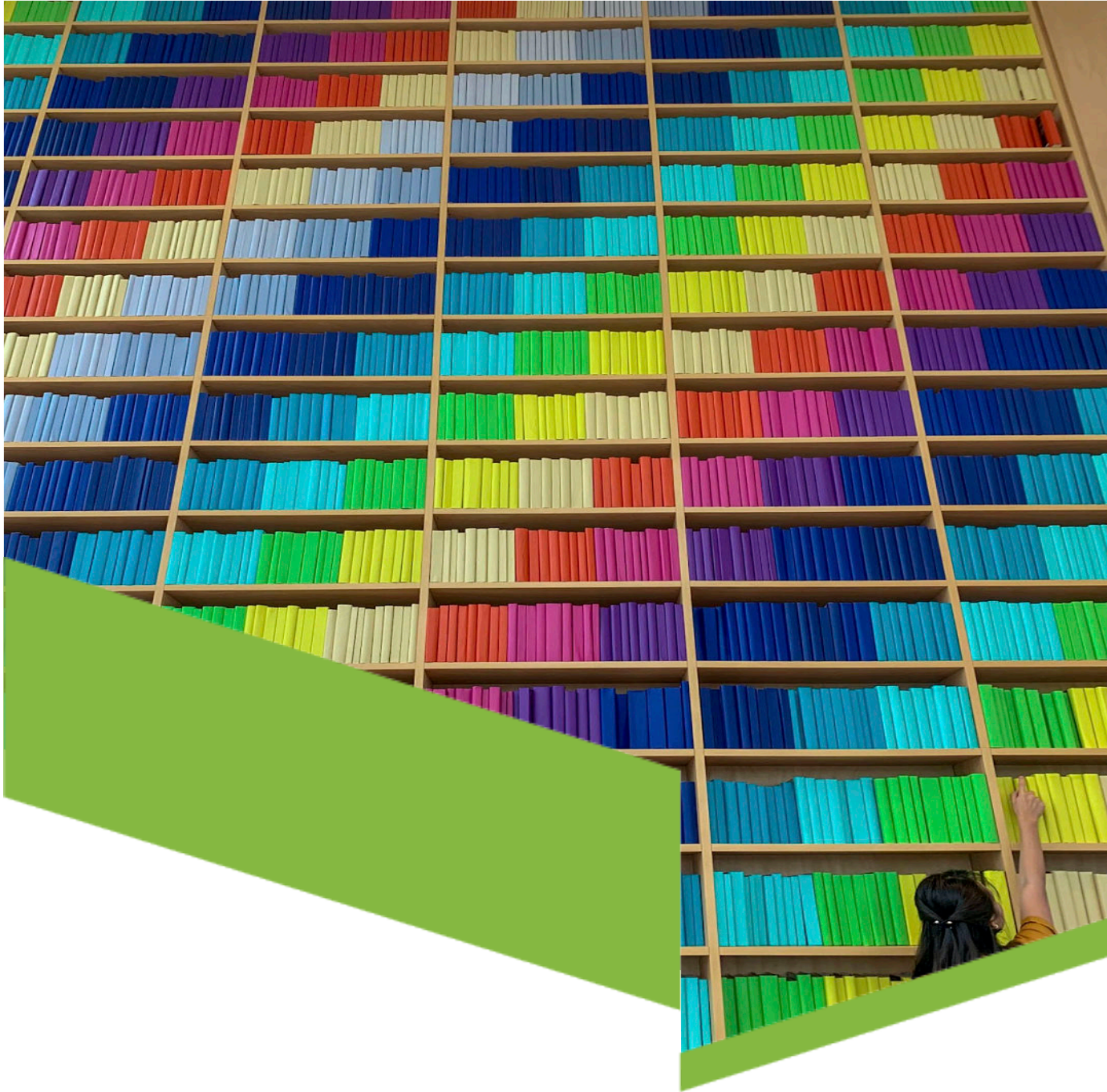
### *CPD Solutions*

ASFA's online CPD solutions are suitable for all superannuation professionals, from administrators through to trustees, and are designed to maintain, improve, and broaden superannuation knowledge, expertise, and competence.

- SuperCPD
- SuperCPD Trustee

### **How to Use This Book?**

The purpose of this Student Handbook is to provide you with all the information that you need to know about studying with ASFA, including ASFA's key policies, your rights and responsibilities as a student, how to enrol, and what to expect during your studies. It is essential that you read and understand this handbook as you are responsible for knowing and complying with policies and procedures relevant to your studies with ASFA.



# Policies

## ASFA Learning Policies

As an RTO we have an obligation to ensure the quality of the nationally recognised training and assessment we deliver. We must comply at all times with the Standards which are part of the VET Quality Framework. To ensure compliance we have developed a quality management system underpinned by comprehensive internal policies, procedures, and systems that guide our compliant operations and we 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 with the Standards.

### Privacy

ASFA is bound by Commonwealth Law to handle personal information in accordance with the *Australian National Privacy Principles (APPs)*. ASFA also ensures that its record keeping procedures comply with the quality standards set for RTO's. Your records are considered confidential, and systems are permanently backed up to ensure the security of your records. Strict guidelines exist for the access to and use of this data. We will not disclose personal information concerning you to parties outside ASFA (including your employers), other than for a purpose that has been made known to you and to which you have given your consent, except where we are legally required to do so or for meeting state or federal compliance requirements.

For more information, please refer to our [Privacy Policy](#).

### Access, Equity and Support

As a student with ASFA you will be treated courteously and with respect throughout the process of enquiry, selection, and enrolment and throughout your studies. You will also be supported in a manner that enables you to achieve your full potential and be provided with opportunities to develop and successfully gain skills, knowledge, and experience through the education and training we provide. If you have a disability or difficulty with basic literacy, numeracy, English language or other areas of learning, you are encouraged to advise us of your support needs prior to or during your course, which will be handled confidentially and with respect.

For further information, please refer to our [Access, Equity and Support Policy & Procedure](#) published on our website.

### Trainers and Assessors

All of our trainers and assessors hold the relevant qualification, have experience, and maintain continuing professional development to ensure they are up to date with industry practices and development. As required by the VET Standards, training and assessment of VET courses is delivered by our trainers and assessors who:

- hold the required credentials (Standards 1.14 and 1.15, Schedule 1 of the Standards)
- hold vocational competencies at least to the level being delivered and assessed (Standard 1.13[a])
- have current industry skills directly relevant to the training and assessment being provided (Standard 1.13[b])
- have current knowledge and skills in vocational training and learning that informs their training and assessment (Standard 1.13[c])
- undertake relevant professional development (Standard 1.16).



## Extension and Deferrals

You may request an extension of up to four weeks free of charge if you are experiencing difficulty or hardship in completing your studies.

You may also purchase 4 weeks additional extension time for \$80 (+ GST), or 12-weeks extension time for \$200 (+GST) if required (up to a maximum of 12 weeks extension per enrolment). Fees may be waived at ASFA's sole discretion in the event of unforeseen special circumstances and will be assessed on a case-by-case basis.

You can also choose to defer (suspend) studies at no cost for a maximum of up to 12 months on the grounds of compassionate or compelling circumstances such as:

- *Medical circumstances:* where your medical condition has changed significantly since enrolling in the course.
- *Family/personal circumstances:* death or severe medical problems within your family, or unforeseen family related difficulties (e.g. financial hardship, escaping from domestic violence or similar)
- Major political upheaval or natural disaster.

Requests for extension or deferral must be made **in writing** to [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au) and the reason(s) for the extension or deferral must be stated, together with any applicable supporting evidence. All evidence will be handled confidentially and with the sensitivity required.

Following a deferral, if studies are not resumed within the maximum 12-month period, you will formally be withdrawn from your studies and will need to re-enrol in the course if you still wish to complete it. Standard re-enrolment charges will apply.

**NOTE:** SuperCPD and SuperCPD Trustee subscriptions cannot be deferred once started. Any points you have obtained up to the point of cancellation will be retained.

## Withdrawals

If you wish to withdraw from your course, you are required to notify ASFA Learning as soon as possible. Where fees have been paid, you or your employer may wish to apply for a refund if special circumstances apply by following our [Fees and Refunds Policy & Procedure](#).

If you have not completed your course by your allocated completion date and there has been no communication with ASFA, Student Advisors, or your Trainer or Assessor; you will be withdrawn from the course. To continue your studies, you will need to re-enrol and standard re-enrolment charges will apply.

If you are undertaking a VET course (i.e. Certificate IV) and have completed any units of competency prior to your withdrawal date, you will receive a Statement of Attainment for any units of competency you were marked competent in. Any attempted/not completed units within your qualification will result in a withdrawn outcome. If you wish to re-enrol in the Certificate IV, these units will be carried over unless the course has been superseded, in which case the transition and teach out rules will apply.

## Transition and Teach Out

From time to time, VET courses and nationally endorsed training packages are amended by the Department of Education, Skills and Employment to ensure that the content and courses meet industry needs. This can result in new versions of courses being developed, which also means that the program of study may change and units of competency that are superseded may or may not have an equivalent in the new course.

For further information about how this may affect you, please refer to our [Transition of Enrolment and Teach Out Policy](#).

## Complaints and Appeals

ASFA supports and encourages open communication and is committed to developing a procedurally fair complaints and appeals process that is carried out free from bias, following the principles of natural justice. ASFA ensures that complaints and appeals:

- are responded to in a consistent and transparent manner
- are based on evidence that is relevant, sufficient, current, and authentic
- are responded to promptly, objectively, with sensitivity and confidentiality
- are reviewed by an impartial person who was not involved in the original issue
- can be made at no cost to the individual
- are used as an opportunity to identify potential causes of the complaint or appeal and to take action to prevent the issues from recurring as well as to identify any areas for improvement.

If you wish to lodge a complaint you can do so in writing by contacting Student Services. You can also view the full ASFA [Complaints and Appeals Policy & Procedure](#) on the ASFA website.



# Enrolment

## Fees

ASFA's course fees can be found on the ASFA website and in each individual course outline. These must be paid prior to commencement of the course (which will be either 7 days from your initial enrolment [if you choose to complete a flexible online course] or prior to the first day of your workshop, whichever comes first) and can be paid by one of the following methods:

- Credit Card (please note a surcharge may apply and these are not included as part of the course fee) via your ASFA Account.
- Direct Deposit/EFT.
- Invoice.

Our course fees will include the following:

- All the training and assessment required for you to achieve the course in which you are enrolling.
- Access to our ASFA Learning Hub for the duration of your studies (or your subscription if you have one), including the content required to complete the course and submission of assessments.
- Sufficient support for you to achieve the course as listed on the *Course Outline*.
- Issuance of one set of certification documents including the testamur (certificate), record of results (if completing a VET course), or a Statement of Attainment (in the case of withdrawal or partial completion of a VET course).

The ASFA [Fees and Refund Policy & Procedure](#) published on our website informs you of your obligations with regard to your student fees and additional costs.

Additional fees and charges will apply for the following:

- Any optional textbooks and materials that may be recommended but are not required to complete a course.
- If a third assessment resubmission is required.
- A replacement Testamur (Certificate) or Statement of Attainment (if required).
- Extension fees (if required depending on your circumstances).
- Any applications for Recognition of Prior Learning (RPL). (There is no cost for credit transfer)

## Cancellation Fees

The following cancellation fees apply to cancellations for flexible online courses and workshops. Student substitutions can be made without cost at any time before commencement of a course or workshop.

| ITEM                                 | FEE       | DETAILS                                 |
|--------------------------------------|-----------|---|
| <b>Online Flexible Enrolments</b>    |           |   |
| Before course commencement           | No fee    | Any course fees paid will be refunded   |
| After course commencement            | No refund | Full course fee is forfeited            |
| <b>Public Workshops</b>              |           |   |
| More than 5 days before commencement | No fee    | Any workshop fees paid will be refunded |

|  |   |                                |
|--|---|--------------------------------|
| Less than 5 days before commencement (incl. no shows)                                  | No refund   | Full workshop fee is forfeited |
| <b>Corporate Workshops</b>   |   |                                |
| Cancelling or re-scheduling a corporate workshop more than 14 days before commencement | No fee  |                                |
| Re-scheduling a corporate workshop date less than 14 days before commencement          | \$500 + any travel or accommodation expenses incurred by ASFA to that point |                                |
| Cancelling a corporate workshop date less than 14 days before commencement             | No refund   | Full workshop fee is forfeited |

## Refunds

As per the Cancellation Fees table, refunds will be provided for course fees paid for courses or workshops cancelled in writing:

- before course commencement for online flexible enrolments
- 5 or more days prior to commencement for public workshops
- 14 or more days prior to commencement for corporate workshops.

You may also be eligible for a refund in the following circumstances:

- You enrolled in a course or workshop that has been cancelled by ASFA and do not wish to transfer your enrolment to another course or person.
- If ASFA is unable to deliver the course as promised (either due to the course being withdrawn or ceasing operations) you will be issued with a refund for any portion of the course that was not provided.

If you withdraw from a course due to special circumstances, you may seek a refund by making an application in writing to [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au). If special circumstances apply, the refund request will then be investigated and processed in accordance with the [Fees & Refund Policy & Procedure](#) published on our website. Notification of the outcome, including a refund if applicable, will be notified to you within 30 business days of ASFA's receipt of the request.

The terms and conditions of enrolment, the [Fees & Refund Policy & Procedure](#), and the availability of ASFA's [Complaints and Appeals Policy & Procedure](#), do not remove your right to take action under Australia's consumer protection laws if you disagree with a refund assessment.

## Enrolment Process

Our enrolment process is simple and aims to be free from bias and discrimination where possible.

To enrol in a course or subscribe to SuperCPD or SuperCPD Trustee, you should locate the course on the [ASFA website](#) that you wish to enrol in and click on the “Enrol Now” button. You will then be prompted to log into your ASFA Account and then simply need to follow the prompts. If you do not have an existing ASFA Account, you can select the ‘Create Account’ option to create an account and complete the enrolment process. Please contact Student Services if you believe that you may have an existing account from a prior employer or you’re experiencing difficulties with enrolment.

All courses have the following entry requirements:

- A minimum age of 18 years at the time of enrolment.
- Access to a reliable Internet connection.
- Access to Zoom if you are undertaking a virtual workshop. If your organisation does not allow you to access Zoom, please let us know and we will advise on how to proceed.

## VET Course Entry Requirements

### *Residency status*

In order to enrol in the Certificate IV Superannuation (or any of our VET courses), you must be one of the following:

- Australian citizen.
- Permanent Resident.
- If you are not living or residing in Australia, you may be able to enrol as an offshore student. Please contact [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au) to discuss your requirements if this applies to you.

**NOTE:** ASFA are not a CRICOS registered provider and are therefore unable to accept enrolments from anyone holding a current student visa, regardless of the circumstances.

### *Language, Literacy and Numeracy (LLN)*

For all VET enrolments, you will also be required to meet the expected LLN skill level. ASFA will deem you to have met the expected LLN skill level for our course when you provide one of the following:

- Evidence showing satisfactory completion of Year 12 or equivalent (if completed in Australia); OR
- A copy of your transcript or testamur showing that you have completed a Certificate IV or higher in any field (provided that the course was conducted primarily in English and through a training provider or higher education provider registered in Australia); OR
- Completion of an online LLN assessment tool with a minimum exit level/score of 3 in all areas.

If you did not complete your secondary education in Australia or you haven’t completed any previous study in Australia, you must complete the online LLN assessment tool.

ASFA will not accept the following as evidence of meeting the expected LLN skill level:

- International qualifications (even if they’ve already been recognised in Australia or if they were delivered in English).
- IELTS, or any other English proficiency test.
- Membership with an industry body.

Should you wish to complete the online assessment tool or if you wish to provide evidence of your Year 12 or course completion, please contact [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au) to arrange this – there will be no charge for the online assessment and you will be provided with a copy of the results upon completion for your records.

If there are gaps identified in your results, ASFA will conduct a further analysis to determine if your needs can be addressed through other options.

### *Unique Student Identifier (USI)*

Enrolment in a VET course also requires you to have a USI prior to your enrolment if you are living/residing in Australia at the time of your enrolment.

A Unique Student Identifier is a reference number provided by the Australian Government which allows you to access a copy of your study records for any VET courses that you have undertaken since 2015.

You can create your USI (or retrieve it if you already have a USI) by going to <https://usi.gov.au> and following the prompts.

ASFA cannot create USI's on behalf of students.

If you do not provide ASFA with your USI and you are not exempt from having one (you can determine if you are exempt by going to the USI website), you will not be able to proceed with your enrolment.

**NOTE:** You are **not** required to provide a USI for any of our non-VET courses (including RG 146 Superannuation).

## **Recognition of Prior Learning (RPL) and Credit**

RPL is a way of formally recognising skills and knowledge gained through work, life experience, or even completion of short courses, depending on the time they were completed.

Credit refers to the process of recognising a unit of competency(s) previously achieved by a student when they are enrolling in a related course where those units can assist them in meeting the requirements for a qualification.

For more information about RPL or Credit, please refer to our [Recognition of Prior Learning and Credit Policy & Procedure](#) or contact ASFA Learning for more information.

**PLEASE NOTE:** Due to licensing and regulatory requirements, ASFA will not grant RPL or credit for any of our non-VET courses, including RG 146 Superannuation.

## **Support needs**

ASFA will ensure that students with a disability or illness are adequately supported throughout their course. It is commonly recognised that there are two types of support available: *academic support* and *personal support*. This may consist of the following:

**Academic Support:** provides students with support in the skills required to complete a course within the accepted timeframe and to a reasonable academic standard. This may include assisting with a reasonable interpretation of assessments or tasks, making reasonable adjustments to the provision of support materials, or allowing the student to submit an assignment through another method.

**Personal Support:** this consists of non-learning support for students. This may include providing extensions to a course, recommending deferrals or re-enrolments due to illness or recommendations to engage with their employer's EAP or a counselling service dependent on the student's needs.

If you do find that you require adjustments to be made or you require further support, please contact [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au) to discuss your support needs. Please note that all information regarding disabilities or health needs is handled confidentially and with sensitivity.

## Student Communication and Record Management

When you (or your employer on your behalf) first register with ASFA, you will be allocated an ASFA ID number (also known as your student number). This number will stay with you for life regardless of whether you change employers or leave a member organisation. Your ASFA ID will also allow you to log in and access your ASFA Account where you can:

- register for courses or workshops
- subscribe to our CPD solutions
- pay any outstanding invoices
- update your enrolment details (if you are enrolled in a VET course)
- access your CPD statement (members only) or activity statement (non-members)
- update your contact details
- access the latest policy updates from our ASFA Policy team.

Our main form of communication with you will be via email, including the official email for issuing your certificate. Please make sure we always have your most current email address and mobile number on file so we can notify you of any changes when they are applicable.

If you change employers at any point during your course, please let us know so that we can ensure your record stays up to date and that you receive a copy of your certificate upon completion.

You can update your records at any time by going to your ASFA Account and selecting "My Contact Details".

Any changes to your legal name must be done by contacting the ASFA **Membership team** and providing evidence of your legal name change (e.g. a change of name certificate or marriage certificate).

## When can I start?

When you enrol/register for a course or workshop you will receive a confirmation letter which will confirm your start date/workshop date. Please ensure that your email address is up to date and check your junk/spam folder if you have not received the confirmation email.

For flexible online courses, once your course fees have been fully paid and processed in our system, you will receive a login letter by email on the start date outlined in your confirmation letter. This will contain your login details for the ASFA Learning Hub and you will be able to instantly log on and commence your course.

If you have registered for an ASFA virtual workshop, so long as your workshop fees have been fully paid and processed in our system, you will receive a link to join the workshop prior to the start of the workshop (usually two days prior). If you are undertaking a virtual workshop which includes an assessment component, you will also be sent a separate email containing your login details for the ASFA Learning Hub.





During your Studies

## Student Code of Conduct

ASFA is committed to creating a safe environment that is inclusive and free from discrimination, regardless of age, sex, disability, race, religion or belief, sexual orientation, transgender status, marital or domestic status, pregnancy and maternity, or any other protected categories under applicable law. We are also committed to providing an online platform that operates in a safe, secure, legal, and respectful way.

### *Academic Excellence*

ASFA expects the following from all students and clients:

- Prepare appropriately for all assessment tasks and workshops.
- Ensure all required course fees are paid prior to the commencement of your course (which is defined as either the first day you have access to the online material or the first day of your workshop, whichever comes first).
- That you or your employer notify ASFA if you are unable to attend a workshop for any reason at least 5 business days prior to the commencement of the workshop.
- That you contact ASFA as soon as possible if any other difficulties arise during your course that may impact your study and may result in you being unable to complete your assessments by the due date.
- That you contact ASFA if your contact details (including your email address or place of employment) change at any point during your study.
- All assessment tasks and learning activities are completed honestly and without engaging in fraudulent activity such as plagiarism.
- All assessment tasks are handed in by the enrolment deadline.
- All outstanding fees are fully paid prior to your certificate being issued.

### *Expected behaviour*

We may not agree with every view or opinion, but we strongly believe in everyone's right to express their views and opinions. We expect all participants to:

- Be respectful of others and viewpoints that may be different from your own.
- Be mindful of your words when engaging in any discussions with students or trainers.
- Be considerate of those around you.

### *Unacceptable behaviour*

Unacceptable behaviour may include, but is not limited to:

- Intimidation or bullying of another person (such as a trainer/speaker/presenter or another attendee) or behaviour that:
  - Promotes or encourages harassment or violence or seeks to intimidate any person.
  - Defames or libels any other person.
  - Promotes potentially harmful misinformation or intentionally deceptive disinformation.
- The use of offensive language, especially if it relates to a person's age, sex, disability, race, religion or belief, sexual orientation, transgender status, marital or domestic status, pregnancy and maternity, or any other protected categories under applicable laws.
- Excessive repeat private chat or meeting requests.
- Sharing your event registration or course registration with another person(s) or making event content available to anyone not registered to attend.

- The sharing or posting of explicit content on any format.
- Infringing on the intellectual property rights of others by sharing or distributing content that you do not have a right to transmit under any law or contractual agreement.
- Abusive behaviour directed towards any member of ASFA staff.
- Any academic misconduct (Refer to the section on Academic Misconduct for more information).

### Consequences of unacceptable behaviour

Unacceptable behaviour will not be tolerated. If a participant is seen engaging in unprovoked and unacceptable behaviour, ASFA will take any action deemed appropriate, including expulsion from the course or workshop without warning or refund.

## Flexible Delivery

All of our flexible online courses, as well as all assessments for workshops (as required), are delivered through the **ASFA Learning Hub**, which allows you to access your studies anytime and anywhere, provided that you have access to a suitable computer or laptop and internet connection.

The ASFA Learning Hub provides you with access to:

- all the materials that you will need to complete your course successfully
- an opportunity to chat with your fellow classmates and seek support where required
- student resources and ways to contact ASFA if required.

For more information on how to log into the ASFA Learning Hub, please refer to **Appendix 1**.

## Technology Requirements

To successfully complete our online courses, you will need access to a PC, laptop or tablet that meets the following requirements:

|                         |  |
|-------------------------|--|
| <b>Operating System</b> | <p>Any of the latest versions of the following:</p> <ul style="list-style-type: none"> <li>• Microsoft Windows</li> <li>• Mac OS X</li> <li>• Linux</li> <li>• Android</li> <li>• iOS</li> </ul>   |
| <b>Software</b>         | <ul style="list-style-type: none"> <li>• A PDF reader such as Adobe Acrobat Reader or similar.</li> <li>• Microsoft Word or a similar word processing program.</li> <li>• Access to an audio or video recording program (VET students only)</li> </ul> <p><i>It is strongly recommended that you have an antivirus program installed on your computer or device and that all software is up to date.</i></p> |
| <b>Internet Browser</b> | <ul style="list-style-type: none"> <li>• Google Chrome</li> <li>• Safari</li> <li>• Mozilla Firefox</li> <li>• Opera</li> <li>• Microsoft Edge</li> </ul> <p><i>Due to compatibility issues, we do not recommend that you use Internet Explorer to access the Learning Hub or your ASFA Account.</i></p>   |

## Course Duration/How often do I need to study?

Your course must be completed within the duration specified on the ASFA website or within each individual course outline, but by no later than the course due date specified in your commencement and/or confirmation letters.

If you are undertaking one of our courses as a virtual workshop, you will have the same amount of time as the flexible online version (if applicable) to complete the assessments (if required) after the workshop.

If you are struggling to meet your deadline, ASFA can provide support through extension(s) or deferral – please see the section marked “Extensions and Deferrals” for more information.

If your course is not completed within the duration specified (this includes resubmissions) your enrolment will be deemed to have been lapsed and your results will either be “Withdrawn” (if you have not submitted any assignments by the due date) or “Not Yet Competent” (if you have failed any submitted assessment/s). You may be required to re-enrol if you wish to complete the course, which will be at a reduced rate.

**Note:** you are responsible for contacting ASFA if you require further support or if you wish to re-enrol.

If you have a SuperCPD or SuperCPD Trustee subscription, you will receive access to a new edition each quarter. At any given time, you will have access to the five most recent editions of SuperCPD or SuperCPD Trustee.

## Support

ASFA is committed to providing a supportive learning environment. You are encouraged to contact our Student Support Team via [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au) throughout the duration of your studies to discuss any support needs you have. You will also receive reminder emails throughout your enrolment to ensure you are on track and can check your results and progress in the ASFA Learning Hub.

## Assessment

Assessment is an important part of your learning and is required to show that you have grasped the concepts covered to an acceptable standard. Successfully completing assessments is simply about demonstrating that you can do the task with confidence to the required industry standard and can apply your knowledge across different areas.

All ASFA assessments are conducted at the standard expected of the course and may include multiple choice quizzes, work samples, case studies, role plays, presentations, and written questioning.

To be awarded a completion certificate, all assessment requirements for the course must be met.

You will be provided with information about your assessment requirements in the course outline and on the ASFA Learning Hub. All ASFA assessments for VET courses are conducted in line with the [ASQA standards of assessment](#).

**NOTE:** If you are attending a workshop for a course which has an assessment component, you are still required to complete the assessment afterwards and will be given access to the ASFA Learning Hub following the workshop to allow for this.

## Submission of Assessment Tasks

All written assessments must be submitted via the ASFA Learning Hub in the format advised on the page for submission. Please do not submit any written assignments in PDF format unless advised to do so.

On submission you will be asked to make a declaration that the work is your own. To safeguard against accidental loss of assessment tasks, it is expected that you keep a copy of all assessments. You should also regularly save your work on an ongoing basis when logged in to the ASFA Learning Hub. In the event of loss occurring, you will be required to submit a new copy of the assessment task concerned.

All online quizzes are marked automatically, and you'll receive immediate feedback upon completion. All other assessments will be marked within 30 days of receipt, and you'll be notified through the ASFA Learning Hub of the outcome of your assessment.

## Assessment Resubmissions

If you have failed an online quiz or your written assignment has been deemed "Not Yet Satisfactory (NYS)", you will be given another opportunity to attempt the assessment. You will be provided with feedback on what you will need to review or re-do before making your second attempt.

**Please note that resubmission of assessments and quiz attempts must be done before your course deadline date.** Therefore, we ask that you submit all written assignments at least four weeks before your course deadline date to allow for enough time to complete any potential re-submissions.

If, after the second attempt, you are still assessed as Not Yet Satisfactory (NYS), you may be required to re-enrol and complete additional training and assessment to support you in achieving a Competent outcome. Additional fees and charges may apply if this occurs.

## VET Course Results

The following results are used for VET courses (Certificate IV in Superannuation):

C – Competent

NYC – Not Yet Competent

RPL – Recognition of Prior Learning

CT – Credit Transfer

## Academic Misconduct

ASFA has a zero-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.

If you are found to have engaged in academic misconduct, you may be subject to disciplinary action which may include withdrawal from the course. For more information, please refer to our [Academic Misconduct Policy & Procedure](#).

## Certificate Issuance

To be deemed as having successfully completed a course the following requirements must be met:

- You have completed all assessment tasks to an acceptable standard.
- All course fees (including extension fees) have been fully paid.
- If you are undertaking a VET course, a Unique Student Identifier has been provided to ASFA.

If you are undertaking a workshop for a course which includes an assessment component, the assessment must be completed for you to be deemed as having successfully completed the course and for a certificate and CPD points to be issued. Attendance of the workshop alone is not sufficient.

All certificates will be issued by ASFA within 30 days of completion of the course are issued as encrypted/secured documents, which means that they cannot be tampered with and contain all the same features as a physical certificate. These will be issued electronically to the email address we have on file and for this reason, we ask that you please ensure your email address is up to date in your ASFA account. Please be advised that we cannot send your certificate directly to your employer or to another third party unless you provide us with permission in writing.

For more information, please refer to our [Certificate Issuance Policy & Procedure](#).

**NOTE:** Certificates are not issued for SuperCPD, SuperCPD Trustee or our Super Professional series virtual workshops. All CPD points or evidence of attendance can be found on your CPD or Activity Statement.

## Replacement Certificates

If you find that you require a replacement certificate or transcript, you can contact [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au) to request a re-print. We can provide a copy of a basic transcript free of charge, which will include all courses undertaken through ASFA and can be provided to your employer to show evidence that you have completed RG 146 or other training. If you require a copy of your official certificate or official testamur (VET courses only), an administrative fee may apply – please contact ASFA Student Support to confirm.

Please note that replacement certificates will show a date of re-issue on the certificate and that your certificate will not be issued until the administration fee has been paid. All re-issued certificates will be under the name that they were originally issued under unless evidence has been provided to ASFA confirming a legal name change.

### *All courses completed prior to 2004*

If you have completed any courses through ASFA prior to 2004, your certificate/s will have been issued by Macquarie University as they were the issuing RTO at that time. Under the National Standards for RTOs and the NVR Act, ASFA cannot re-issue these under any circumstances. You will therefore need to contact Macquarie University to arrange for a copy of your transcript or testamur.

ASFA can however, provide you with further information about the courses that were offered prior to 2004 (e.g. subject information).

## Academic Appeals

All students have the right to appeal an assessment decision where they feel the assessment process was unfair or that the decision made by the assessor does not accurately reflect their competence or grade of achievement.

If you do not agree with an assessment decision, you can lodge an assessment appeal by following the [Complaints and Appeals Policy & Procedure](#) published on the ASFA website.

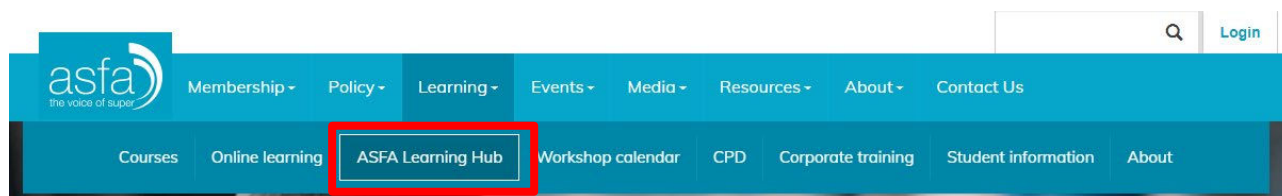


## Appendices

## How to log into the Learning Hub.

In order to access your course or SuperCPD subscription on the Learning Hub, please visit the ASFA website at: <https://www.superannuation.asn.au/>

Along the top menu bar, hover your mouse over the 'Learning' tab and then click on 'ASFA Learning Hub'.



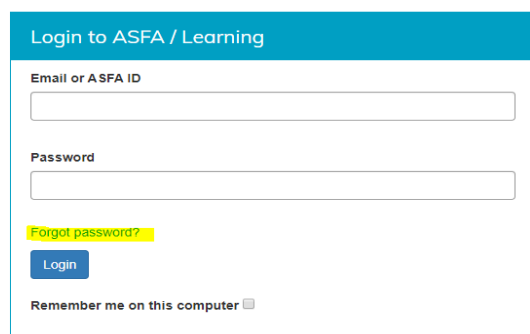
This will take you to the Learning Hub log in page.

You can also access the Learning Hub directly at this website:

<https://learning.superannuation.asn.au/moodle/>

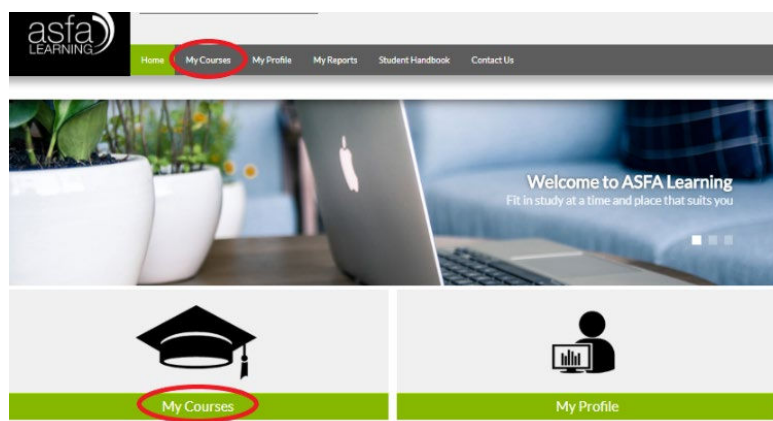
Enter your email address or ASFA ID number (this will be on the confirmation letter attached to your registration confirmation email) and password.

If you have forgotten your password or need to create one, click on the 'Forgot Password' link. This will send you an email to reset/ create a password.

A screenshot of the ASFA Learning Hub login page. The page has a blue header with the text 'Login to ASFA / Learning'. Below the header are two input fields: 'Email or ASFA ID' and 'Password'. There is a 'Forgot password?' link in yellow text below the password field. A blue 'Login' button is below the input fields. At the bottom, there is a 'Remember me on this computer' checkbox.

Please ensure to check your spam/junk folder as the password reset email may have landed there.

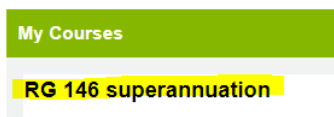
Once you have logged in to the Learning Hub, you can access your course by clicking on 'My Courses' along the top menu bar OR by clicking the 'My Courses' tile on the main page.



Your course(s) will be listed below.

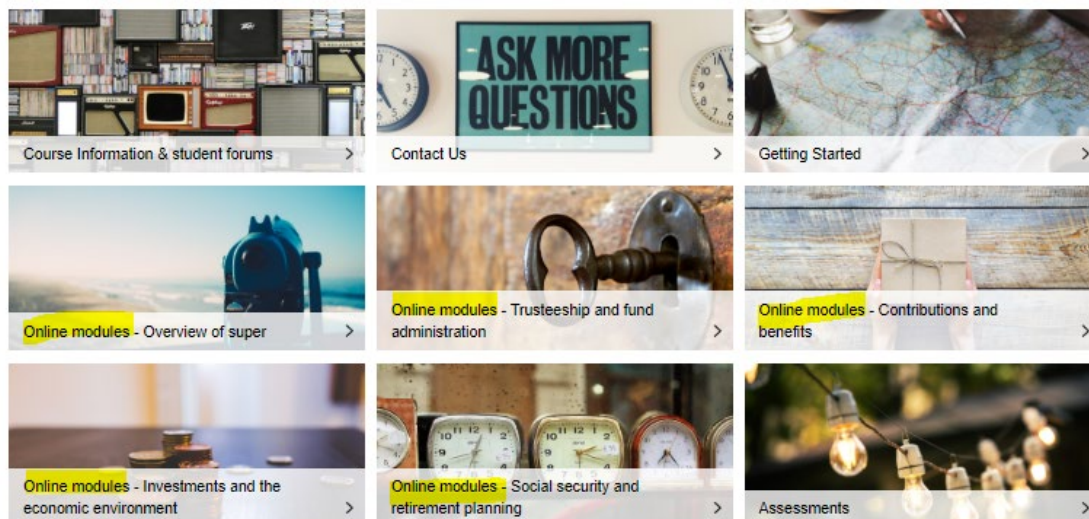


Click on the course or SuperCPD edition you would like to access.

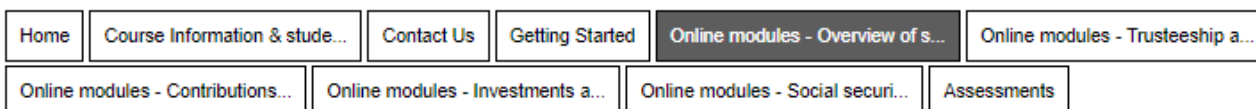


This will bring you to the home page of your course.

The course content is under each tile that says 'Online modules - ...'.

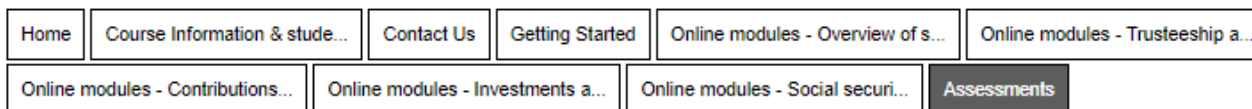


The modules/ chapters are found under these tiles or by clicking through the 'Online modules' tabs.



- Module 1: The superannuation industry
- Module 2: Superannuation industry regulation

The course assessments are found under the final tile/ tab titled 'Assessments'.



- Online Exam
- Written assignment

Some courses will allow you to also download the course notes for each module.

To do this, enter the module by clicking on the desired module, and then clicking 'Enter'.

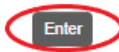
### Module 3: Trusteeship

In this module we discuss the operation of superannuation funds as trusts, governed by a trust deed (or governing rules for public sector schemes). We also examine the duties a superannuation trustee must undertake under relevant superannuation legislation, which is in addition to the duties specified under general trust laws.

Please use the 'Enter' below button to access the module.

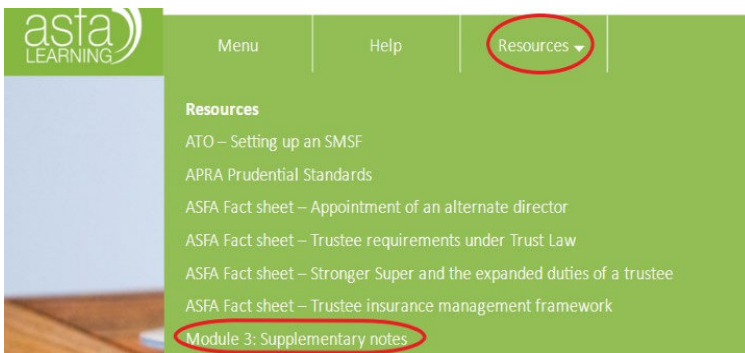
Contents

- Trusteeship
- Trusteeship



The module will open in a new window.

Along the top menu bar, click on the 'Resources' tab and then click 'Module #: Supplementary notes'.



This will open a PDF version of the module notes in a new window.

## ASFA Learning Hub Troubleshooting

### *I get a Server 500 error or an overflow error when I attempt to log in*

If you have experienced either of these upon logging in, please try the following:

1. **Refresh** the page first by clicking on the refresh button at the top of the screen and try logging in again.
2. Clear your browser's cache (you can Google how to do this for your specific browser).
3. If you are still getting the error message after having cleared the cache, try logging in on another browser or computer and see if the issue persists (this may be due to an issue at the browser or network level and is something ASFA cannot address).
4. If you have tried all of the above steps and you are still getting the error message, take a screenshot of the error message and send it through to [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au).

**NOTE:** If you've saved your login details on your browser, you may need to re-enter them again after clearing your cache.

### *When I log in, it says that I don't have access to the Learning Hub.*

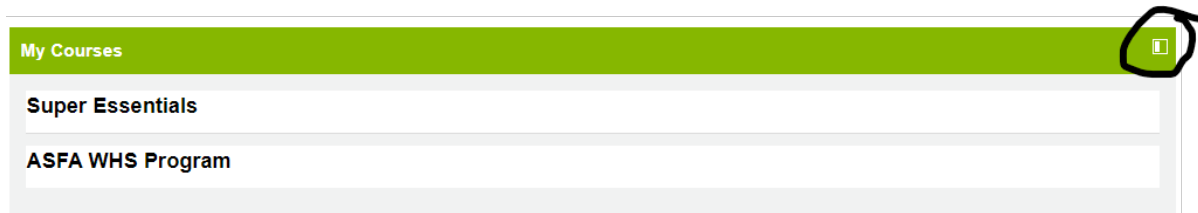
This may be due to one of the following reasons:

- Your course fees have not yet been paid or are still being processed.
- Your course fees have been paid but you have attempted to access the course before your commencement date (please check your confirmation letter for your commencement date).
- Your SuperCPD or SuperCPD Trustee subscription has expired and you will need to arrange for your subscription to be renewed as soon as possible (any CPD points you have attained up to the point of expiry will still be retained).

NOTE: SuperCPD is not automatically granted with membership status.

### *My course/s have disappeared when I click on the "My Courses" menu:*

This is a common issue caused by accidentally clicking on the "Dock" button located on the top right-hand side of the "My Courses" menu.



Clicking this will result in the menu moving to the left-hand side of the screen and make it look like the course has disappeared. This can be easily fixed by clicking on the "dock" button again in its new location at the bottom left-hand side of the screen.

If you find that this issue persists after you have clicked this button, please contact ASFA Learning Student Support.

### *I have accidentally submitted the wrong document for my written assignment*

Please send through the intended document to the ASFA Learning team as soon as possible, who will forward it to the tutor on your behalf. **Do NOT try to delete or resubmit your document.**

## External Support Services

If you require additional support with your studies, work, or life, ASFA recommends you contact your organisation's Employee Assistance Program (EAP) provider (if one exists) or one of the following community organisations who may be able to assist you:

### *Lifeline*

Telephone: 13 11 14

Website: <https://www.lifeline.org.au>

Anyone can call Lifeline. They offer a counselling service that respects everyone's right to be heard, understood, and cared for, as well as information about other support services that are available in communities around Australia.

### *Beyond Blue*

Telephone: 1300 22 4636

Website: <https://www.beyondblue.org.au/>

Beyond Blue provides information and support to help everyone in Australia achieve their best possible mental health, whatever their age and wherever they live. They can also refer you to several other mental health support services.

### *SuperFriend*

Website: <https://superfriend.com.au/>

SuperFriend designs and delivers mental health initiatives for the superannuation industry that enable workplaces to thrive.

### *Reach Out*

Website: <https://au.reachout.com/>

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.

### *Reading and Writing Hotline*

Telephone: 1300 655 506

Website: <http://www.readingwritinghotline.edu.au>

They can provide you with advice and a referral to one of 1200 providers of courses in adult literacy and numeracy.

### *National Disability Coordination Officer (NDCO) Program*

Telephone: 133 873

Website: <https://www.dese.gov.au/access-and-participation/ndco>

The Australian Government's National Disability Coordination Officer (NDCO) Program works strategically to assist people with disability access and participate in tertiary education and subsequent employment, through a national network of regionally based NDCOs.

### *Head to Health*

Website: <https://www.headtohealth.gov.au/>

This is an Australian government initiative aimed at connecting you with a wide range of mental health resources.

## RG 146 and Continuing Professional Development (CPD) FAQs.

IMPORTANT: This information is correct as of the time of writing and may be subject to change.

*Given the relatively new professional standards for financial advisors, is RG 146 still relevant?*

The professional standards **do not apply** to a person who only provides:

- general advice, and/or
- personal advice on products that are not relevant financial products, such as general insurance, consumer credit insurance or basic banking products.

**RG 146 continues to apply to people who provide general advice**, personal advice on basic banking products, general insurance and/or consumer credit insurance and individuals who provide financial product advice in relation to a time-sharing scheme. See [here](#) for more information on this from ASIC.

*How many CPD points/hours do I need to maintain my RG 146?*

The view of ASIC under RG 146 as of this writing is that there is no prescribed minimum CPD points/hours per year that an adviser needs to have undertaken to still maintain currency with RG 146. As the AFS license is primarily held by each of the individual funds, they are responsible for setting policies and procedures to ensure that their advisers are undertaking sufficient training to maintain their knowledge and stay up to date with industry needs, as well as keeping records of this.

All industry professionals are encouraged to undertake CPD and ASFA recommends the following CPD is undertaken each year:

- **ASFA Associates and Fellows:** ASFA requires you to earn 30 CPD points per year to maintain your status, including at least 15 from ASFA specific activities.
- **ASFA Trustee Associates and Trustee Fellows:** ASFA requires you to earn 30 CPD points per year to maintain your status, including at least 15 trustee points from ASFA specific activities.
- **Compliance professionals, relationship managers and senior managers:** ASFA recommends you earn 30 CPD points per year.
- **Administrators, call centre staff:** ASFA recommends you earn 20 CPD points per year.

*Do I need to do any specific courses with ASFA to maintain my RG 146?*

CPD can take many forms, including workshops, short courses, attendance at conferences or other industry events or self-study and further information about what this may entail can be found here - [ASFA CPD](#). It is up to you and your employer to decide what CPD options best suit you.

*What happens if I've only completed some of my CPD requirements due to leave or changing employers?*

ASFA is not a licensing or regulatory body and we do not monitor CPD activity for RG 146 compliance purposes. If you do not complete your CPD requirements set by your employer, you will need to discuss this with them.

### *What if I have not maintained my CPD over the 12-24 months?*

If you have not fully maintained your CPD over the 12-24 months but are still employed within the superannuation industry, we would recommend that you enrol and complete our RG 146 Refresher course as this will recap the key points of RG 146 and then bring you up to date with any changes over the last 1-2 years, followed by subscribing to SuperCPD or SuperCPD Trustee to assist with ongoing CPD development.

If you have been unable to maintain your ongoing professional development for more than 2 years or otherwise not worked within the superannuation industry for that period of time at all, we would recommend that you complete our RG 146 Superannuation course.

### *Is your RG 146 Superannuation course accredited or approved in the Financial Adviser Standards?*

No. In order to be approved for the training of licenced financial advisers, a course has to be at a Bachelor degree level or higher – level 7 on the Australian Qualifications Framework (AQF). Therefore, only universities and accredited higher education providers can offer approved courses.

ASFA's RG 146 Superannuation course is equivalent to a Diploma level (level 5 on the AQF) which is the standard level for all RG 146 courses. You can find more information here:

[Australian Government Treasury - Financial Adviser Standards](#)  
[Financial Adviser Standards - Approved Courses](#)  
[Australian Qualifications Framework \(AQF\) - AQF Levels](#)

### *Will your CPD options meet requirements for licenced financial advisers?*

If you have already met the education standards for licenced financial advisers and need superannuation courses as part of ongoing CPD requirements, then it is up to the licensee (the AFSL holder – this would be your employer) to determine what CPD is required and how the points align to the mandatory categories for CPD. The minister does not approve specific CPD activities or providers.

More information can be found here: **Financial Adviser Standards - Continuing Professional Development**

Essentially what this means is that once you meet the education standard requirements, you can get your ongoing CPD from various sources, including ASFA, but it is up to your compliance team or equivalent at the Licensee you are a representative for (in most cases, this will be your employer) to approve that these meet the requirements and to also determine which knowledge area the CPD falls under.

The minimum hours for CPD and the mandatory categories are:

- Technical – 5 hours
- Client Care and Practice – 5 hours
- Regulatory Compliance and Consumer Protection – 5 hours and
- Professionalism and Ethics – 9 hours
- The balance up to 40 hours must consist of qualifying CPD.

1 x ASFA CPD point is equivalent to 1 hour under Financial Adviser Standards requirements and all ASFA courses could potentially be used towards the CPD requirements for licenced financial advisers so long as they are approved by the Licensee. If your compliance team needs further clarification, please contact the ASFA Learning team.

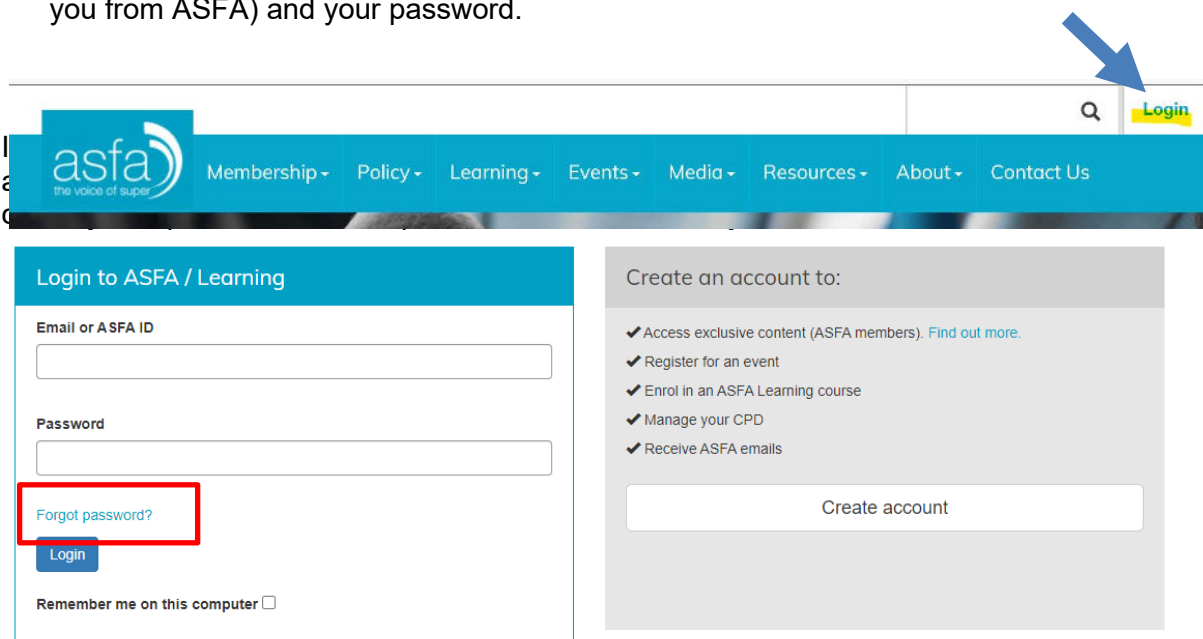
If you are subscribed to SuperCPD or SuperCPD Trustee, all articles from November 2021 edition onwards include a table on the second page outlining the hours of training the article provides in the Financial Adviser Standards knowledge areas and RG 146 knowledge areas.

## Generating a CPD or Activity Statement

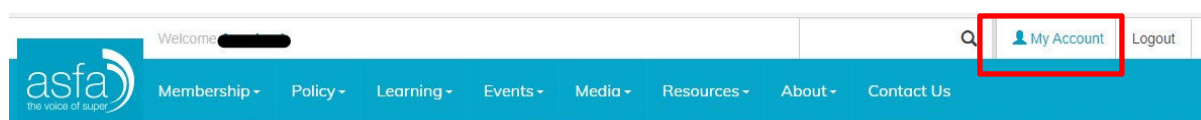
If you or your employer are a member with ASFA, you can generate a CPD statement, which will show the number of CPD points you have accrued for each activity you have undertaken with ASFA as well as any external activities you have done and added into your record.

If you or your employer are not a member with ASFA, you will only be able to access an Activity Statement, which will show the activity you have done with ASFA but does not show the CPD points accrued.

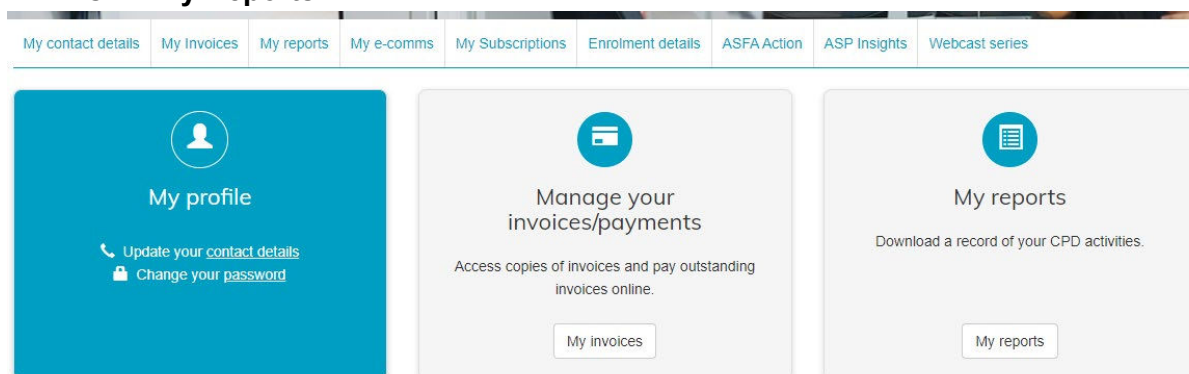
1. Log into the ASFA website at: <https://www.superannuation.asn.au/>.
2. When prompted, enter either your email address or ASFA ID number (this may also be known as your “member ID” and will appear on any statements or letters sent directly to you from ASFA) and your password.



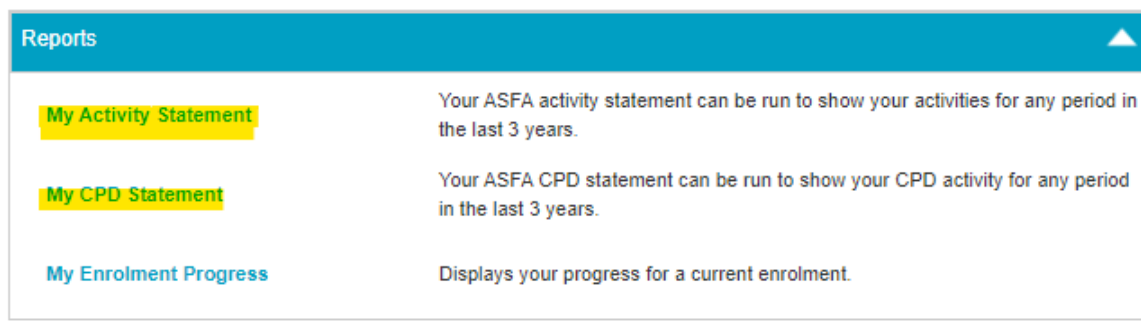
3. Once logged in, click **My Account** to be taken to the **ASFA Toolbox**.



4. Click **My Reports**



You'll be provided with the option to generate either an Activity Statement (members or non-members) or CPD Statement (members only). Click on a report name to run it.



The screenshot shows a 'Reports' section with three items:

- My Activity Statement**: Your ASFA activity statement can be run to show your activities for any period in the last 3 years.
- My CPD Statement**: Your ASFA CPD statement can be run to show your CPD activity for any period in the last 3 years.
- My Enrolment Progress**: Displays your progress for a current enrolment.



5. Activity in the last 3 years can be included in the report. Select the date range you would like to report on and click **Run report**. You can save this or print this as required.

## Activity Report

The ASFA Activity reporting tool, allows you to search and generate a statement for all your activities, annually or by specific date range.

Please allow 10 working days for activity to appear on your statement.

Please select the dates you want to search from the calendar below, and click on 'Run report'. Click on the 'save' icon to export a PDF version of your report.

Date from:   Date to:  

ASFA's CPD statements show all CPD activity as points. If your organisation reports using hours, you can use the ratio of 1 CPD point = 1 hour of activity. Should you or your employer have any further queries about any of the activity on the report, please contact ASFA earning Student Support.

Some activities undertaken through ASFA may take up to 10 business days to appear on your statement. If your activity does not appear after 10 business days, please contact ASFA as soon as possible.

### *Adding External Activities to your CPD Statement*

If you are an ASFA member (either through your organisation or through individual membership), you also have the option of adding any professional development activities undertaken through another organisation to your ASFA CPD statement.

This allows for you to have one record of everything in one easy place.

1. Go to My Reports  
Scroll down and select 'Upload your CPD activity from external providers'



| Reports  |   |
|--|---|
| <a href="#">My Activity Statement</a>                            | Your ASFA activity statement can be run to show your activities for any period in the last 3 years. |
| <a href="#">My CPD Statement</a>                                 | Your ASFA CPD statement can be run to show your CPD activity for any period in the last 3 years.    |
| <a href="#">My Enrolment Progress</a>                            | Displays your progress for a current enrolment.   |
| Reports by group   |   |
| Reports by manager   |   |
| Manage my groups   |   |
| <a href="#">View/Edit groups</a>                                 |   |
| <a href="#">View/Edit manager list</a>                           |   |
| External CPD   |   |
| <a href="#">Upload your CPD activity from external providers</a> |   |

2. Fill in the details of your activity and press Submit.

Submit details of your activity outside of ASFA

Client name  Activity completion date \*

Structured \* (Set to Yes for activities with formal assessment)

Activity name \*

Activity details

Name of external CPD provider

Points (1 point = 1 CPD hour)

**HELPFUL TIPS:**

- The **name of the activity** is what will appear on your CPD statement. If there is no clear name for the activity, enter in the closest approximation (check with your employer if in doubt) e.g. “ABC Super – Customer Service Training.”
- An activity is considered to be **structured** when CPD points are awarded based on the completion of an assessment activity (e.g. a quiz, written assignment, demonstration or similar). If you received CPD points simply for attending and/or participation only, then the activity is **unstructured**.

### Bulk uploading external activities

1. At the bottom of the External CPD upload page is the option to bulk upload your activities. Before uploading, please read the instructions carefully.

Name of external CPD provider

Points (1 point = 1 CPD hour)

**Submit**

#### Upload multiple records for yourself and/or on behalf of your colleagues

##### NEW FEATURES

CPD points can now be entered as decimals with 1 CPD Hour = 1 CPD point.

The Structure of the activity is now recorded. For activities with formal assessment, set Structured to Yes otherwise set to No

##### Step one: Download the CPD template

Click [here](#) to download the CPD template.

Do not add or alter the columns of the template as it may cause it to be invalid.

Complete the template with the ASFA ID, Activity date, Structure, Activity name (to show on the CPD report) and points for each entry (1 point = 1 CPD hour).

Optionally you can provide additional details (e.g. This was a 15 week course) and the name of the external training provider.

Once you have updated all entries in the spread sheet, check all details, particularly the ASFA ID, are correct before you save the file.

2. Your external activities will appear on your CPD statement grouped under External Activities, and are denoted by the suffix [EXT]
3. Uploaded activity may take up to 24 hours to appear on your report.

**The Association of Superannuation Funds of Australia Limited (ASFA)**

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