

Day three – Case study three

Topic outcomes


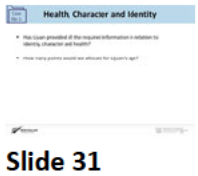
By the end of this topic, learners will be able to apply the end-to-end process when assessing a SMC application, where there is greater complexity.

Topic resources

- Facilitator computer and projector
- Participant computers
- SMC PowerPoint
- Skilled work experience and practice
- Case study three


Lesson plan


Time	Topic	Resource	Your notes
5 mins	Hand out case study three Accountant 2 Risk rating - Medium. Explain: They will work on the case study activities individually ; however, they may ask other class members or the facilitator for guidance if they need help at any stage.	Case study three	
10 mins	Risk rating Discuss risk level medium.		



Time	Topic	Resource	Your notes
	<p>Explain that information relating to risk can be found on the Verification Toolkit.</p> <p>Allow pairs 10 minutes to find information relating to the role.</p> <p>Ask pairs to report back.</p> <p>Risk ratings</p> <p>s 6(c)</p> 		
10 mins	<p>Identity, health and character requirements</p> <p>Pop Quiz about health</p> <p>Show slide 31</p> <p>Allow pairs 5 minutes to answer the questions.</p> <p>Ask a pair to report back.</p> <p>Pop Quiz:</p> <p>Q). What documents do you need to verify when checking identity?</p> <p>A). <i>Current passport (the original document or a certified copy) and full birth certificate (original, or certified copy).</i></p>	 <p>Slide 31</p>	



Time	Topic	Resource	Your notes
	<p>Q). From what age do people named on an application need to provide a birth certificate? A). <i>Aged 17 years or older.</i></p> <p>Q). Police certificates need to be provided for any country an applicant has lived in for more than 12 months in the last how many years? A). <i>10 years.</i></p> <p>Q). All applicants must have an ASH except in what circumstances? A). <i>They are entering NZ for medical treatment and have been granted a visa for this, or are applying for a further residence class visa.</i></p> <p>Q). How recent should medical evidence (such as medical certificates and X-rays) be at the time of assessment? A). <i>Less than three months before the date of the application.</i></p> <p>Q). What is the role of the MA? A). <i>Give immigration officers their opinion on the probability that the applicant will or will not meet our requirement for applicants to have an ASH. This includes giving a likely cost for prognosis and treatment.</i></p> <p>Q). What is ORS?</p>		


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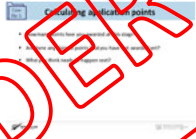

Time	Topic	Resource	Your notes
	<p>A). Funding that provides specialist services and support to students with the highest needs for special education. Once a student is in ORS, their funding stays with them throughout their schooling.</p> <p>Q). What is the role of the HAT? A). They manage a medical examination from when it starts to the outcome stage.</p> <p>Q). What types of things would an immigration officer contact the HAT for? A). Case specific information, responding to Health Assessment Warnings, advising when a visa application has been received when IHS indicates the case requires MA referral, following up on a medical examination (if in open state), getting clarification of requested tests</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? 		
15 mins	<p>English language requirements As a recap, ask class (without looking at their notes):</p> <ul style="list-style-type: none"> • How recent should the acceptable language test be at the time of lodging an application (SM4.5)? 	 <p>Slide 32</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"> What is the minimum standard of English language for principal applicants. <p>Show slide 32</p> <p>In pairs, allow 10 minutes to answer the questions.</p> <p>Ask for volunteers to answer the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> Does XXXX meet the minimum requirements for English? What did you check in reaching this decision? 		
15 mins	<p>ANZSCO</p> <p>As a recap ask class (without looking at their notes).</p> <ul style="list-style-type: none"> What is ANZSCO (SM6.10)? What is ANZSCO used for (SM6.10)? <p>Briefly refresh learners about how ANZSCO is accessed and how to use it.</p> <p>Show slide 33</p> <p>In pairs, allow 10 minutes to answer the question.</p> <p>Ask for a volunteer to answer the question.</p> <p>Question:</p> <p>What is the ANZSCO skill level for this role and is it sufficient to meet skilled employment requirements?</p>	 <p>Slide 33</p>	

Time	Topic	Resource	Your notes
35 mins	<p>Job meets the definition of skilled</p> <p>As a recap ask class (without looking at their notes):</p> <ul style="list-style-type: none"> • What is a substantial match? (SM6.10.5.1) • How does the Operations Manual define Skilled Employment? (SM6.10) • Ask learners to navigate to the General Work-Related Risks and Advice page and as a class discuss the risk factors on this page • Ask the class what risks there may with this case study in relation to whether the job is skilled? (Facilitator to ensure potential risks of job inflation and compliance are covered in this discussion). <p>Show slide 34</p> <p>In pairs, allow 15 minutes to answer the questions.</p> <p>Ask for volunteers to answer the questions</p> <p>Questions:</p> <ul style="list-style-type: none"> • Is the job a substantial match to ANZSCO? • Do you have enough information at this point to make a decision about whether the job meets the definition of skilled? • If not, what further information do you require? 	 <p>Slide 34</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>
20 mins	<p>Remuneration threshold</p> <p>As a recap ask class (without looking at their notes):</p> <ul style="list-style-type: none"> • How is remuneration calculated? (SM6.20) <p>Show slide 36</p>	 <p>Slide 36</p>	<p>SMC Visa Assessment Tool (Post-28 August 2017): http://thelink/content/inzkit/Pages/verifying-and-assessing.aspx</p>

Time	Topic	Resource	Your notes
	<p>In pairs, allow 10 minutes to answer the question.</p> <p>Ask for volunteers to answer the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> Does XXXX's hourly rate meet the remuneration threshold? Are you satisfied that the role is sustainable given the rate being offered and what you know about the employer at this stage? 		
10 mins	<p>Is the applicant suitably qualified for skilled employment?</p> <p>As a recap ask class (without looking at their notes):</p> <ul style="list-style-type: none"> What is ANZSCO's role in the qualifications level and how does this relate to being suitably qualified? (SM16.10.5) <p>Show slide 36</p> <p>In pairs allow 5 minutes to answer the questions.</p> <p>Ask for volunteers to answer 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 36</p>	
10 mins	<p>Qualification level of the person</p> <p>As a recap ask class (without looking at their notes):</p> <ul style="list-style-type: none"> What is a recognised qualification? (SM8.10) What evidence is required for a overseas qualification not listed on the NZQF? (SM8.15) 	 <p>Slide 37</p>	

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> Explain how the points for recognised qualifications allocated? (SM8.5.1) <p>Briefly remind participants how to use LQEA. Show slide 37 In pairs, allow 5 minutes to answer the question. Ask for volunteers to answer the question.</p> <p>Question: How many points can we award Lijuan for his qualification?</p>		
20 mins	<p>Calculating skilled work experience As a recap ask class (without looking at their notes):</p> <ul style="list-style-type: none"> How are the points for skilled work experience calculated? (SM7.5) What are some additional requirements for skilled work experience i.e. hours worked? (SM7.20) <p>Activity: Calculating work experience (5 minutes). Show slide 38 In pairs, allow 10 minutes to answer the questions. Ask for volunteers to answer the questions.</p> <p>Questions:</p>	 <p>Slide 38</p> <p>Skilled work experience practice</p>	

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none"> How many points, if any, can the applicant be awarded for skilled work experience? How did you make this calculation? 		
20 mins	<p>Calculating the application points</p> <p>In pairs, allow 15 minutes to answer the questions.</p> <p>Show slide</p> <p>Ask each pair to answer the questions.</p> <p>Ask the pairs to report back.</p> <p>Questions:</p> <ul style="list-style-type: none"> How many points have you awarded at this stage? (SM1.10) Are there any points you have not yet awarded, which they claimed? What you think needs to happen next? 	 <p>Slide 39</p>	
25 mins	<p>PPI</p> <p>Ask What a 'PPI' is and why we do a PPI?</p> <p>Show slide 40</p> <p>Assume you are going to PPI this applicant.</p> <p>Allow 20 minutes for pairs to write a list to answer the questions.</p> <p>Questions:</p> <ul style="list-style-type: none"> What instructions have not yet been met and what are the reasons for your concerns? 	 <p>Slide 40</p>	

Time	Topic	Resource	Your notes
	<ul style="list-style-type: none">• What further information do you want the applicant or their employer to provide?		

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Live applications with TA – session one

Topic outcomes

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

Topic resources

- Facilitator computer and projector
- Participant computers
- Live applications

Lesson plan

Time	Topic	Resource	Your notes
3 hrs 45 mins	<p>Hand out applications to individuals, pairs or to groups of three.</p> <p>Explain that learners can raise their hand at any time to ask questions of the TA or the facilitator.</p> <p>Explain that each time learners get to a point of wanting to make a determination in AMS they are to stop and seek approval from the TA before proceeding. Explain that this is crucial as the learners do not yet have the authority to make such decisions.</p> <p>If learners get to a point that they have determined that further information is required, write a bullet list of required information, and show it to the TA. Once approved the TA will put the file aside for. Provide the learners with a new application to work on.</p>	Live applications	<p>Note: Organise the class to work individually, in pairs or in threes. This will depend on the confidence and skill levels of the learners, and the size of the class.</p> <p>If the class is larger, then you may want to organise into threes so that the TA has the ability to have oversight over all applications being processed.</p>

Review day three

Topic outcomes

By the end of this topic, learners will be able to articulate any questions arising from the case studies and/or the live application practice.

Topic resources

Whiteboard and markers

Lesson plan

Time	Topic	Resource	Your notes
15 mins	Ask each individual/pair/group to tell the class: <ul style="list-style-type: none">• About their application?• What they saw?• What they did?• About any key learnings.	Whiteboard and markers	

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Day four – Live applications with TA – session two

Topic outcomes

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

Topic resources

- Facilitator computer and projector
- Participant computers
- Live applications

Lesson plan

Time	Topic	Resource	Your notes
6 hrs 30 mins	<p>Hand out applications.</p> <p>Explain that learners can raise their hand at any time to ask questions of the TA or the facilitator.</p> <p>Explain that each time learners get to a point of wanting to make a determination in AMS they are to stop and seek approval from the TA before proceeding. Explain that this is crucial as the learners do not yet have the authority to make such decisions.</p> <p>If learners get to a point that they have determined that further information is required, write a bullet list of required information, and show it to the TA. Once approved the TA will put the file aside for. Provide the learners with a new application to work on.</p>	Live applications	

Review day four

Topic outcomes

By the end of this topic, learners will be able to articulate any questions from the case studies and/or the live applications before the course finishes.

Topic resources

Whiteboard and markers

Lesson plan

Time	Topic	Resource	Your notes
30 mins	<p>Ask each individual/pair/group to tell the class</p> <ul style="list-style-type: none">• About their applications?• What they saw?• What they did?• Any key learning points? <p>Ask the class if they have any questions before the course finishes.</p>	Whiteboard and markers	

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SMC CASE SUMMARY – <Application Number>

Lodgement date: <xx/xx/xxxx>

<input type="checkbox"/>	Application form signed by all applicants 17 & over
<input type="checkbox"/>	Family tab updated for all applicants
<input type="checkbox"/>	Contacts tab updated with employer/adviser
<input type="checkbox"/>	Address tab updated for the PA
<input type="checkbox"/>	Country of birth/citizenship correct for all applicants

APPLICANTS

Total number of applicants included as per AMS: <x>

Partner/ child not included:

<Provide CN of the excluded partner or child and establish if R2.40 (d)/ R5.115 applies>

EOI

Total points claimed in the EOI: <xx>

False and misleading information identified at EOI stage (SM3.10.1): Choose an item.

RISK ASSESSMENT:

Risk rule: Choose an item.

If risk factors triggered:

- Summary of risk factors triggered:
- This has been addressed by:

AMS ALERTS/WARNINGS:

Client: <summary of alerts/ warnings and steps taken to mitigate the risk>

Employer: <summary of alerts/ warnings and steps taken to mitigate the risk>

Advisor (if any): <summary of alerts/ warnings and steps taken to mitigate the risk>

Declined/ withdrawn visas: <summary of concerns and steps taken to mitigate the risk>

IDENTITY

Principal applicant:

Full birth certificate:

Choose an item.

Passport scanned:

Choose an item.

MRZ checked:

Choose an item.

Discrepancies noted:

Choose an item.

Satisfied identity confirmed:

Choose an item.

Secondary applicant:

Full birth certificate:

Choose an item.

Passport scanned:

Choose an item.

MRZ checked:

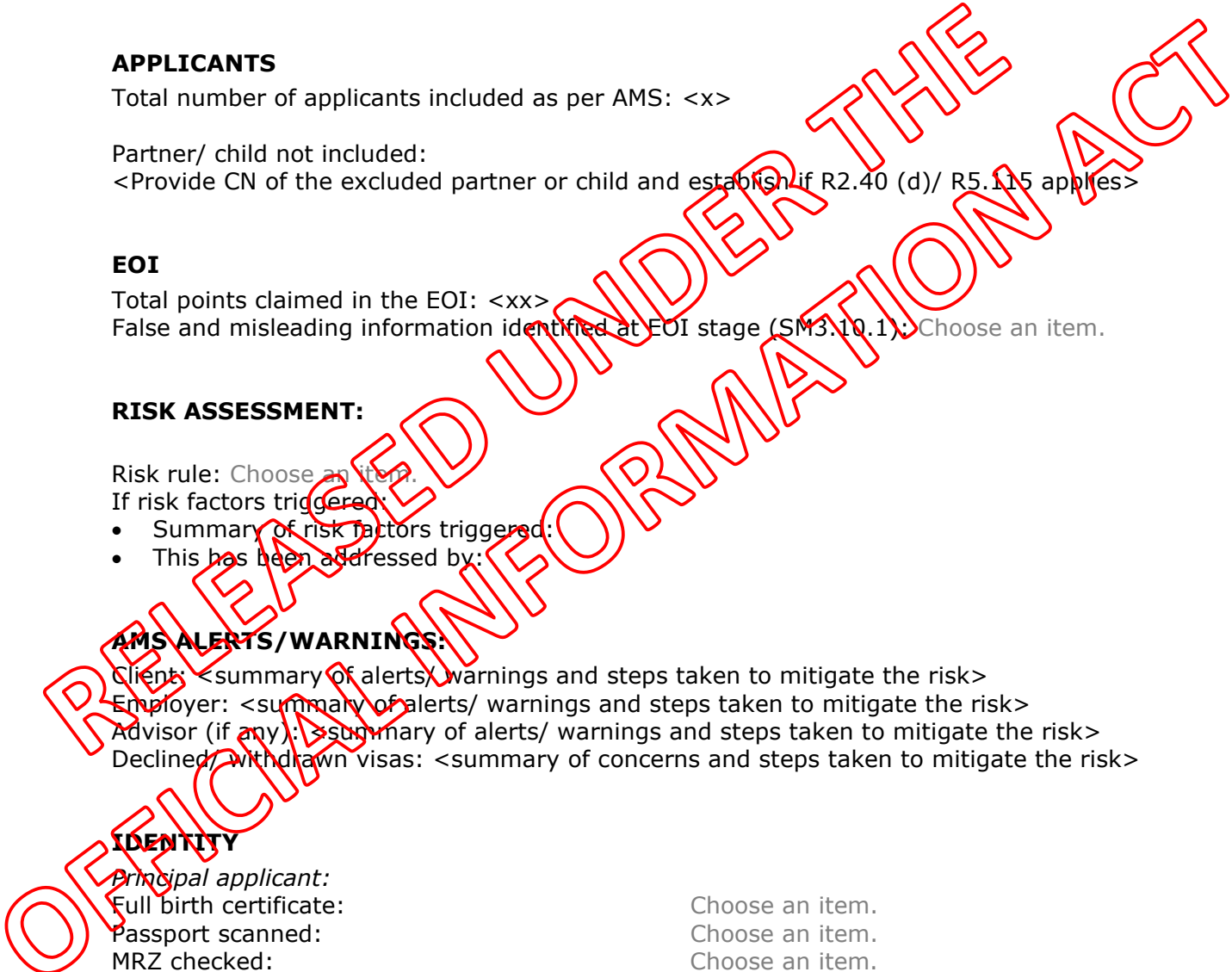
Choose an item.

Discrepancies noted:

Choose an item.

Satisfied identity confirmed:

Choose an item.



HEALTH A4

Client	ASH
PA	Choose an item.
SA	Choose an item.
DA1	Choose an item.

NZER/HR correctly linked in AMS for each applicant? : Choose an item.

Satisfied all applicants meet health requirements: Choose an item.

<Comment on any declarations noted but no referral to MA was undertaken, whether client has been out of NZ for 6 consecutive months, medical waiver process and outcome and other details as appropriate>

CHARACTER A5

- NZPC requested and received for all applicants if required. Choose an item.
- Valid PC provided for offshore countries if required? Choose an item.
- NSC referral completed for all applicants if required. Choose an item.
- SAT assessment required: Choose an item.
- RAT assessment required: Choose an item.
- Adverse character information declared: Choose an item.
- Satisfied all applicants meet character requirements. Choose an item.

<Comment on any PCs not required (eg. country declared but not lived in for 12mths in last 10 years), PCC or character waiver granted and other details as appropriate>

RELATIONSHIP R2 (if applicable)

Brief history of partnership: The couple have been in a relationship since <yy>. The couple are <married/ in a de facto relationship>. No risks identified.

Genuine and stable: <briefly summarise supporting evidence/ information and any other verification conducted i.e. interview>

Credible evidence of living together for at least 12 months:
<List examples of evidence provided including dates>

Period(s) of separation: Choose an item.

Based on the evidence on file I am satisfied the couple have been living together in a genuine and stable relationship for <x> months or more at the time the application is assessed.

If the partner is deferred: <Comment on why the partner is deferred, the duration of the deferral period and the deferred AN>

CUSTODY R2 (If applicable)

DA1:
Choose an item.

<Select from above and record documents/ information provided to meet instructions>

DEPENDENCE R2 (if applicable)

DA1:

Choose an item.

<Select from above and record documents/ information provided to meet instructions>

ENGLISH SM4

PA:

Choose an item.

SA:

Choose an item.

<Comment if the qualification used to meet English has not been assessed under the Qualification section>

POINTS

AGE SM5= xx points at EOI selection

PA was less than 56 years of age at application lodgement. Choose an item.

SKILLED EMPLOYMENT SM6 = xx points

Job title	<job title>
Employer	<name of legal entity and trading name if any>
Start date	<xx/xx/xx or no start date>
Location	<region>
Salary/ hourly rate	<\$xx>
Hours of work per week	<xx>
Market rate met	Choose an item.
ANZSCO code and occupation	<xxxxxx and name>
Skill level	Choose an item.
Remuneration threshold	Choose an item.
Registration (if required)	Choose an item.
Type of employment	Choose an item.
Duration of employment	Choose an item.
EA compliant	Choose an item.

Genuine, sustainable and ongoing employment:

<Record information gathered, steps taken to assess/ verify or why accepted at face value>

Suitably qualified by: Choose an item.

Employment substantially matches ANZSCO description:

<Provide comment and details of tasks the PA is undertaking in their role and how these tasks do or do not demonstrate if PA's employment substantially matches the ANZSCO description. Provide comment if the qualification is not directly relevant to employment or if the qualification is not assessed for points>

Telephone interview conducted: Choose an item.



SKILLED EMPLOYMENT BONUS = xx points

Choose an item.

<Comment on how the applicant meets Appendix 4 requirements>

QUALIFICATIONS SM8 = Choose an item.

Name of qualification	<name of qualification>
Awarding institute	<name of institute>
Country	<country name>
Award year	<year>
Recognition	Choose an item.
NZQF Level	Choose an item.
Discrepancies noted	Choose an item.

QUALIFICATION BONUS SM8.25 = xx points

Choose an item.

<If bonus points are awarded for a different qualification not assessed above, then insert qualification section here>

WORK EXPERIENCE SM7 = xx points

Satisfied the applicant has <xx> years of skilled work experience.

<Copy work experience calculator here>

Suitably qualified by: Choose an item.

Role: 1

- Job title:
- Employer:
- Country:
- ANZSCO:
- Skill level:
- Substantial match to the claimed ANZSCO: <Provide comment and details of tasks the PA has undertaken in their role and how these tasks do or do not demonstrate if PA's employment substantially matches the ANZSCO description>
- Verification: <Provide comment on evidence provided, as appropriate, any verification conducted and outcome or why verification was not undertaken>

Comparable labour market: Choose an item.

Work experience was lawfully obtained: Choose an item.

WORK EXPERIENCE BONUS SM7.25, SM7.30 = xx points

Choose an item.

<Comment on how the applicant meets Appendix 4 requirements>

PARTNER'S RECOGNISED QUALIFICATIONS SM9.10 = xx points

Partnership requirement met: Choose an item.

English met: Choose an item.

<Insert qualification assessment field from above>

PARTNER'S SKILLED EMPLOYMENT SM9.5 = xx points

Partnership requirement met: Choose an item.

English met: Choose an item.

<Insert skilled employment assessment field from above>

TOTAL POINTS AWARDED

Age	00
Skilled employment in NZ	00
Bonus - Skilled employment outside Auckland	00
Bonus - Skilled Employment in LTSSL	00
Bonus - Skilled employment with higher remuneration	00
Recognised Qualification	00
Bonus - Qualifications gained in NZ	00
Skilled work experience	00
Bonus - Skilled work experience in New Zealand	00
Bonus - Skilled work experience in LTSSL	00
Bonus - Partner's skilled employment in NZ	00
Bonus - Partner's qualification	00
Total	00

PPI PROCESS

Where a PPI has been sent, summarise:

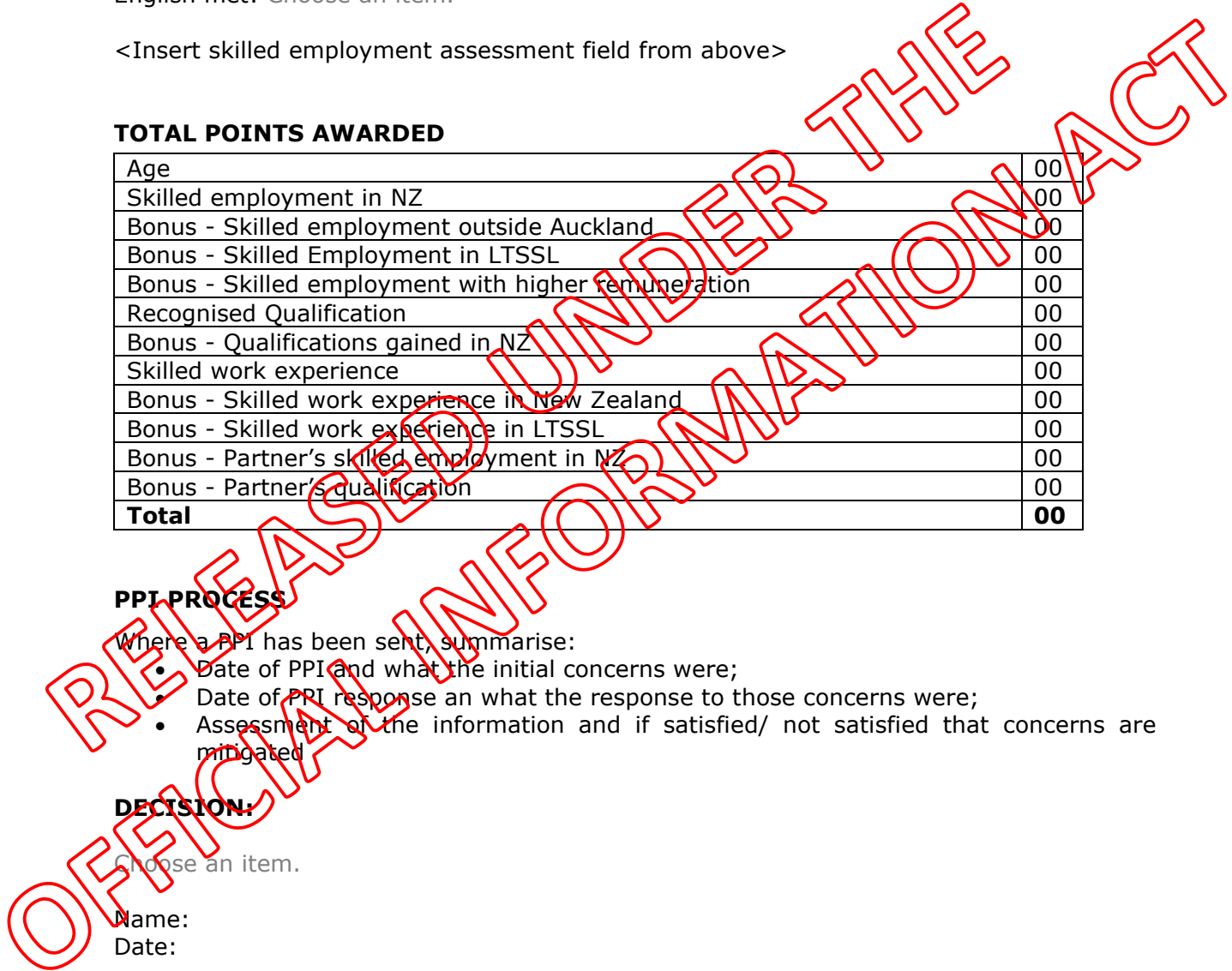
- Date of PPI and what the initial concerns were;
- Date of PPI response and what the response to those concerns were;
- Assessment of the information and if satisfied/ not satisfied that concerns are mitigated

DECISION:

Choose an item.

Name:

Date:



PARENT RESIDENT VISA ASSESSMENT TEMPLATE - PRINCIPAL APPLICANT

(F4 - PARENT CATEGORY INSTRUCTIONS)

Application information
Invitation to Apply (ITA) number:
Invitation to Apply (ITA) issued on click or tap to enter a date.
Application number:
Date application accepted: click or tap to enter a date.
Principal applicant's name:
Advisor/exempt person:
Principal applicant's current visa status: choose an item.
Application form complete: choose an item.

Principal applicant's identity
Has the Principal applicant's (PA) citizenship and identity been confirmed with their birth certificate OR passport? choose an item.
Are there any discrepancies with the PA's identity details? choose an item.
Comments:
Passport confirmation: choose an item.
Identity comments: choose an item.
Identity requirements met: choose an item.

Principal applicant's character assessment (Instructions A5)
Principal applicant has declared choose an item.
Comments:
PA is a citizen of the following countries:
PA has declared spending 12 months or more in the following countries during the past 10 years:
Police Certificates:
Insert Country Police Certificate issued on xx/xx/xxxx. choose an item.
The Police Certificate is choose an item.
New Zealand Police Certificate issued on xx/xx/xxxx. choose an item.
The New Zealand Police Certificate is choose an item.
National Security Check (NSC) completed on xx/xx/xxxx. choose an item.
Comments:
Are there any additional character concerns? choose an item.
Comments:
Is a character waiver required? choose an item.
Character requirements met: choose an item.

Principal applicant's health assessment (Instructions A4)
Significant health issues declared? choose an item.
Health:
<ul style="list-style-type: none"> • Valid Medical Certificate dated: • Valid Chest X-ray certificate dated:
Outcome of Medical: choose an item.
Medical has been assessed under choose an item. medical requirements.
Validity
The Medical Certificate is choose an item.
The Chest X-ray certificate is choose an item.
Health warnings
In AMS choose an item.
Health comments:
Health requirements met: choose an item.

Sponsor identity and eligibility (Instructions F4.35)
Sponsor's name:
Joint sponsor's name:
The sponsor is choose an item.
The joint sponsor is choose an item.
The sponsor has held the status of choose an item.
The joint sponsor has held the status of choose an item.
Sponsor's evidence of NZ residence: choose an item.
Joint sponsor's evidence of NZ residence: choose an item.
For each of the three 12-month portions within the three years immediately preceding the date the application is made, the sponsor has spent a total of 184 days or more in New Zealand: choose an item.
For each of the three 12-month portions within the three years immediately preceding the date the application is made, the joint sponsor has spent a total of 184 days or more in New Zealand: choose an item.
Relationship of the sponsor(s) to the applicant
The sponsor(s) will be one of the following: choose an item.
Dependency
The sponsor is choose an item.
The joint sponsor is choose an item.
Completed sponsorship form for residence provided (sponsor): choose an item.
Completed sponsorship form for residence provided (joint sponsor): choose an item.

Sponsorship undertakings (Instructions R4.10)
The sponsor or joint sponsors agree to meet their obligations for 10 years from the visa holder's first day as a New Zealand resident. F4.45 (a): choose an item.

Family relationship requirements (Instructions F4.30)

The sponsoring adult child meets the family relationship requirements at F4.30 and their relationship to the principal applicant can be captured under one of the following definitions:

Adult Child One: choose an item.
Adult Child Two: choose an item.

Dependent children (Instruction F4.30.5)

Principal applicant does not have any dependent children: choose an item.

Evidence that parents are deceased (Instructions F4.40.15)

The following evidence of the parents' death has been supplied (original or certified copies):
choose an item.

Details:

Evidence of relationship to children (Instructions F4.40)

The following evidence of the principal applicant's relationship to their sponsor or joint sponsors has been supplied (original or certified copies):

- Birth certificates establishing the relationship of the children to the parent
- Household registration documents
- Evidence of adoption
- Legal documents showing that the principal applicant was named as the guardian of the sponsor(s), to have custody of the sponsor(s), and the right to control their upbringing in the event of the death of the sponsor(s) biological or adoptive parents.
- Court order granting legal guardianship of the sponsoring adult children to the principal applicant (including custody of the sponsor(s) and the right to control their upbringing) after the death of their parents and prior to the sponsor(s) attaining the age of 18.
- Documents showing that the sponsor(s) lived with the principal applicant after the death of their parents and prior to the sponsor(s) attaining the age of 18 years.
- Documents such as medical and school records indicating that the principal applicant acted in the role of a parent for the sponsor(s) after the death of their biological or adoptive parents and prior to the sponsor(s) attaining the age of 18 years.

Income requirements (Instructions F4.35.5)

The sponsor or joint sponsors have total income that meets the minimum income threshold: choose an item.

The sponsor or joint sponsors meet the income threshold for two 12-month periods within the 3 years prior to being invited to apply: choose an item.

The sponsor or joint sponsors can demonstrate their income through evidential requirements: choose an item.

Evidence of Income:

- New Zealand Inland Revenue tax statements (**Summary of Income**)
- New Zealand Inland Revenue Final Tax Summary (**for self-employed sponsors**)

	12-month period	Type of income	Total income (NZD\$)
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Sponsor One	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		

Sponsor Two	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		

Total Income (NZD\$ combined)	Year 1	Year 2	Year 3

Note: The income threshold required to be met for each 12-month period is calculated based on the median income that is in effect at the **end of each 12-month period** the sponsor is providing evidence for.

12-month periods for sponsors don't overlap? choose an item.

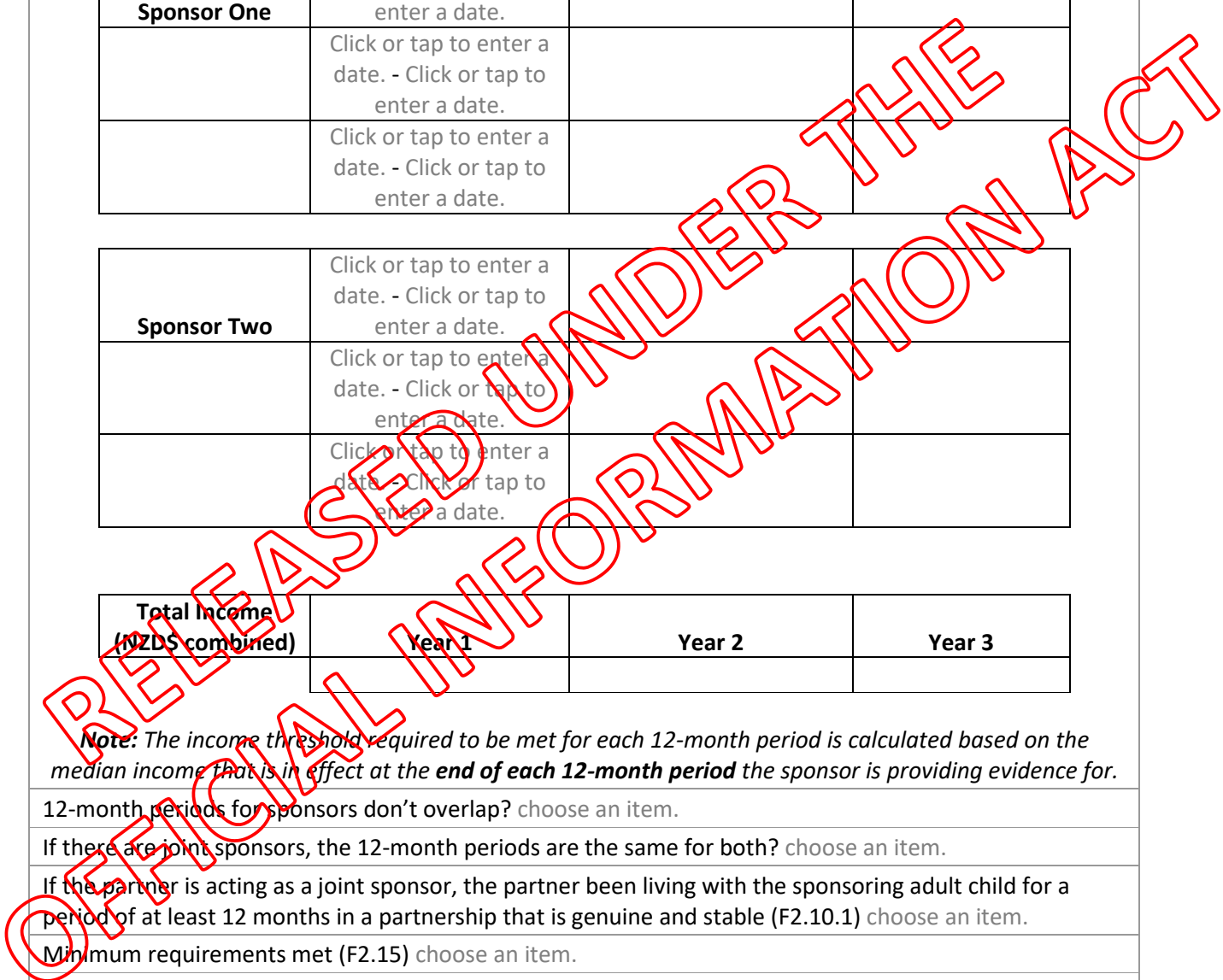
If there are joint sponsors, the 12-month periods are the same for both? choose an item.

If the partner is acting as a joint sponsor, the partner been living with the sponsoring adult child for a period of at least 12 months in a partnership that is genuine and stable (F2.10.1) choose an item.

Minimum requirements met (F2.15) choose an item.

Later application ineligibility (R5.35): choose an item.

Are more than six parents being sponsored? choose an item.



English language requirements (Instructions F4.25)

The English language requirements are met: choose an item.

The following evidence has been supplied: choose an item.

Details:

s 6(c)



Potentially Prejudicial Information (PPI) Letter

Is a potentially prejudicial information (PPI) letter required to be sent: choose an item.

Delete the below if a PPI letter is not required.

PPI sent on xx/xx/xxxx pertaining to instruction/s:

PPI response received on xx/xx/xxxx.

The response includes:

Does the PPI response mitigate the concerns initially raised: choose an item.

Why/Why not?

Rationale:

Request for further information (RFI)

Steps taken: choose an item.

Comments:

Request for further information (Response)

Information provided:
Decision stage
Decision: choose an item.
Decision rationale:
<u>Conditions of visa:</u> The multiple entry travel conditions on a resident visa granted under the Family Parent Category must be valid for 10 years from the visa holder's first day as a resident in New Zealand.
Are there any additional conditions to be placed on the visa label: choose an item.
Additional conditions:
[Case officer's name] [Immigration Officer/Senior Immigration Officer] Immigration New Zealand click or tap to enter a date.

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PARENT RESIDENT VISA ASSESSMENT TEMPLATE - SECONDARY APPLICANT

(F4 - PARENT CATEGORY INSTRUCTIONS)

Application information
Invitation to Apply (ITA) number:
Invitation to Apply (ITA) issued on click or tap to enter a date.
Application number:
Date application accepted: click or tap to enter a date.
Secondary applicant's name:
Advisor/exempt person:
Secondary applicant's current visa status: choose an item.
Application form complete: choose an item.

Secondary applicant's identity
Has the Secondary applicant's (SA) citizenship and identity been confirmed with their birth certificate OR passport? choose an item.
Are there any discrepancies with the SA's identity details? choose an item.
Comments:
Passport confirmation: choose an item.
Identity comments: choose an item.
Identity requirements met: choose an item.

Secondary applicant's character assessment (Instructions A5)
Secondary applicant has declared choose an item.
Comments:
SA is a citizen of the following countries:
SA has declared spending 12 months or more in the following countries during the past 10 years:
Police Certificates:
Insert Country Police Certificate issued on xx/xx/xxxx. choose an item.
The Police Certificate is choose an item.
New Zealand Police Certificate issued on xx/xx/xxxx. choose an item.
The New Zealand Police Certificate is choose an item.
National Security Check (NSC) completed on xx/xx/xxxx. choose an item.
Comments:
Are there any additional character concerns? choose an item.
Comments:
Is a character waiver required? choose an item.
Character requirements met: choose an item.

Secondary applicant's health assessment (Instructions A4)

Significant health issues declared? choose an item.

Health:

- Valid Medical Certificate dated:
- Valid Chest X-ray certificate dated:

Outcome of Medical: choose an item.

Medical has been assessed under choose an item. medical requirements.

Validity

The Medical Certificate is choose an item.

The Chest X-ray certificate is choose an item.

Health warnings

In AMS choose an item.

Health comments:

Health requirements met: choose an item.

Sponsor identity and eligibility (Instructions F4.35)

Sponsor's name:

Joint sponsor's name:

The sponsor is choose an item.

The joint sponsor is choose an item.

The sponsor has held the status of choose an item.

The joint sponsor has held the status of choose an item.

Sponsor's evidence of NZ residence: choose an item.

Joint sponsor's evidence of NZ residence: choose an item.

For each of the three 12-month portions within the three years immediately preceding the date the application is made, the sponsor has spent a total of 184 days or more in New Zealand: choose an item.

For each of the three 12-month portions within the three years immediately preceding the date the application is made, the joint sponsor has spent a total of 184 days or more in New Zealand: choose an item.

Relationship of the sponsor(s) to the applicant

The sponsor(s) will be one of the following: choose an item.

Dependency

The sponsor is choose an item.

The joint sponsor is choose an item.

Completed sponsorship form for residence provided (sponsor): choose an item.

Completed sponsorship form for residence provided (joint sponsor): choose an item.

Sponsorship undertakings (Instructions R4.10)

The sponsor or joint sponsors agree to meet their obligations for 10 years from the visa holder's first day as a New Zealand resident. F4.45 (a): choose an item.

Family relationship requirements (Instructions F4.30)

The sponsoring adult child meets the family relationship requirements at F4.30 and their relationship to the secondary applicant can be captured under one of the following definitions:

Adult Child One: choose an item.
Adult Child Two: choose an item.

Dependent children (Instruction F4.30.5)

Secondary applicant does not have any dependent children: choose an item.

Evidence that parents are deceased (Instructions F4.40.15)

The following evidence of the parents' death has been supplied (original or certified copies):
choose an item.

Details:

Evidence of relationship to children (Instructions F4.40)

The following evidence of the secondary applicant's relationship to their sponsor or joint sponsors has been supplied (original or certified copies):

- Birth certificates establishing the relationship of the children to the parent
- Household registration documents
- Evidence of adoption
- Legal documents showing that the secondary applicant was named as the guardian of the sponsor(s), to have custody of the sponsor(s), and the right to control their upbringing in the event of the death of the sponsor(s) biological or adoptive parents.
- Court order granting legal guardianship of the sponsoring adult children to the secondary applicant (including custody of the sponsor(s) and the right to control their upbringing) after the death of their parents and prior to the sponsor(s) attaining the age of 18.
- Documents showing that the sponsor(s) lived with the secondary applicant after the death of their parents and prior to the sponsor(s) attaining the age of 18 years.
- Documents such as medical and school records indicating that the secondary applicant acted in the role of a parent for the sponsor(s) after the death of their biological or adoptive parents and prior to the sponsor(s) attaining the age of 18 years.

Income requirements (Instructions F4.35.5)

The sponsor or joint sponsors have total income that meets the minimum income threshold: choose an item.

The sponsor or joint sponsors meet the income threshold for two 12-month periods within the 3 years prior to being invited to apply: choose an item.

The sponsor or joint sponsors can demonstrate their income through evidential requirements: choose an item.

Evidence of Income:

- New Zealand Inland Revenue tax statements (**Summary of Income**)
- New Zealand Inland Revenue Final Tax Summary (**for self-employed sponsors**)

	12-month period	Type of income	Total income (NZD\$)
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Sponsor One	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		

Sponsor Two	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		
	Click or tap to enter a date. - Click or tap to enter a date.		

Total Income (NZD\$ combined)	Year 1	Year 2	Year 3

Note: The income threshold required to be met for each 12-month period is calculated based on the median income that is in effect at the **end of each 12-month period** the sponsor is providing evidence for.

12-month periods for sponsors don't overlap? choose an item.

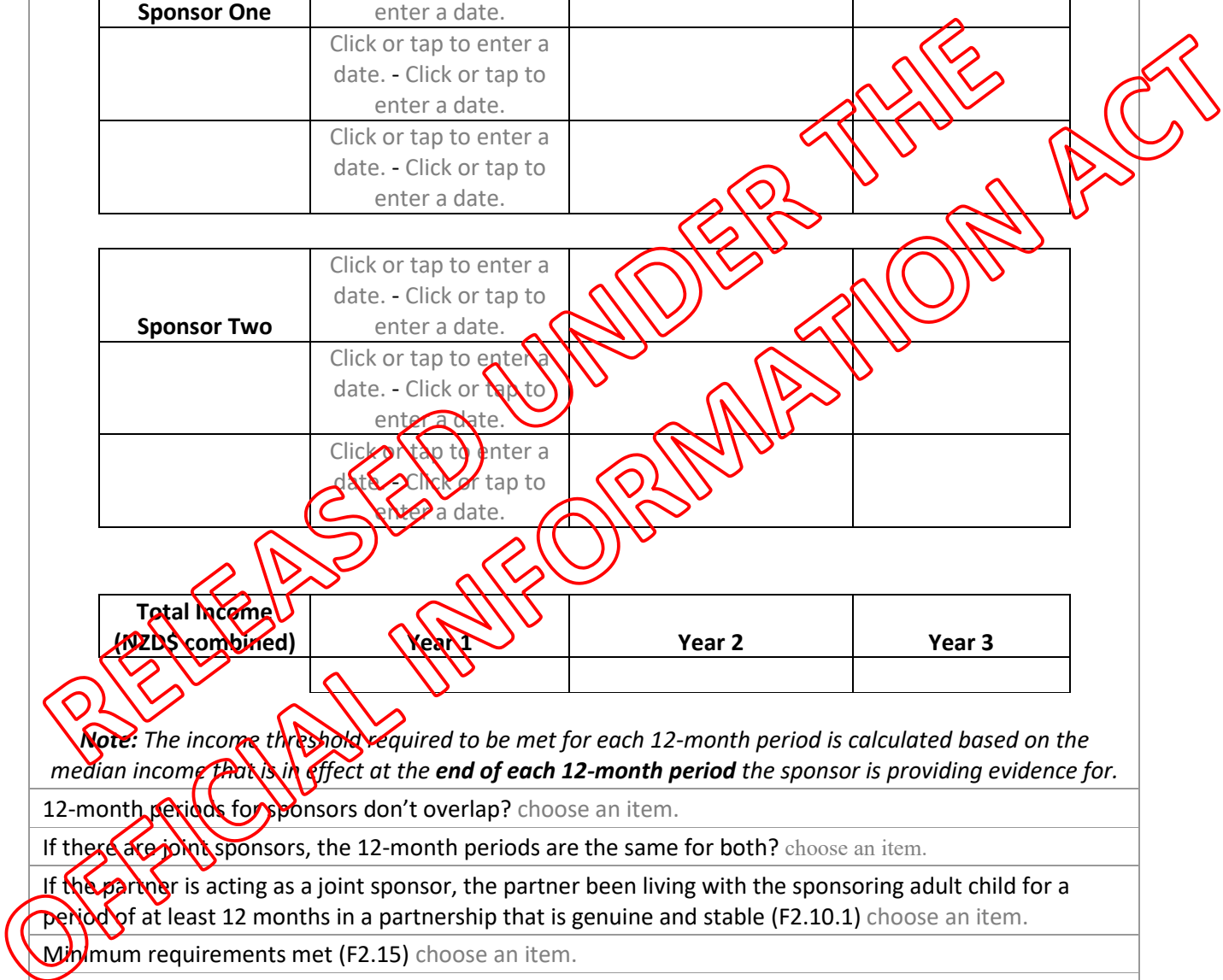
If there are joint sponsors, the 12-month periods are the same for both? choose an item.

If the partner is acting as a joint sponsor, the partner been living with the sponsoring adult child for a period of at least 12 months in a partnership that is genuine and stable (F2.10.1) choose an item.

Minimum requirements met (F2.15) choose an item.

Later application ineligibility (R5.35): choose an item.

Are more than six parents being sponsored? choose an item.



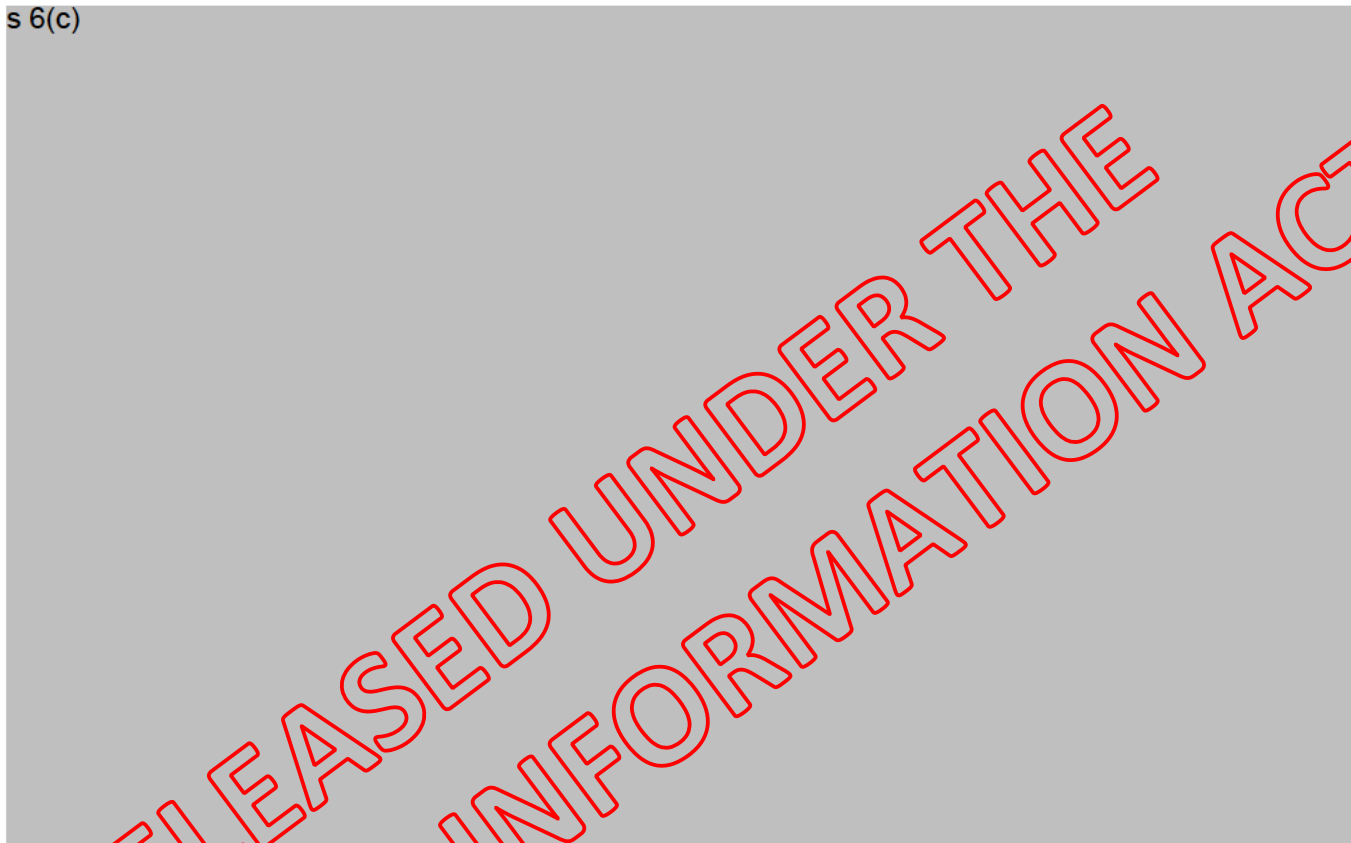
English language requirements (Instructions F4.25)

The English language requirements are met: choose an item.

The following evidence has been supplied: choose an item.

Details:

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Potentially Prejudicial Information (PPI) Letter

Is a potentially prejudicial information (PPI) letter required to be sent: choose an item.

Delete the below if a PPI letter is not required.

PPI sent on xx/xx/xxxx pertaining to instruction/s:

PPI response received on xx/xx/xxxx.

The response includes:

Does the PPI response mitigate the concerns initially raised: choose an item.

Why/Why not?

Rationale:

Request for further information (RFI)

Steps taken: choose an item.

Comments:

Request for further information (Response)

Information provided:
Decision stage
Decision: choose an item.
Decision rationale:
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