

Global Process Manual

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Assess and decide an application for a Student Visa

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When to use

When assessing one of the Student Visa (SV) application types below:

- Full fee paying (including Study Abroad)
- Pathway
- Exchange
- English language studies
- Foreign Government Supported (this is NOT NZAID/Manaaki scholarship holders. For these students, please see SOP XXX)

Role

- Immigration Officer (IO)

Guidelines

While processing an SV, some parts of the assessment s 6(c)

An Immigration Officer has the discretion to conduct verification on document(s) of the information provided in the application raises concern.

▼Related Resources ▶[\(Click to expand\)](#)

English language students	Visa Pak 105
Remaining enrolled during thesis marking (Masters only)	Visa Pak 123
Aviation Student Instructions and U3.10 Acceptable evidence of paying tuition fees	Visa Pak 199

Exchange Students.	Visa Pak 96
Self-employment on student visas	Visa Pak 400
Reminders on Offers of Place	Visa Pak 270
Reminder - Ensuring that a student has a Pathway Student Visa offer of place before granting a Pathway Student Visa	Visa Pak 313
Overarching visas for New Zealand Certificate in English language and English language training schemes	Visa Pak 360
Year level on student visa labels	Visa Pak 227
Work rights for students pre- and post-course	Visa Pak 493
Student visas and work rights	Visa Pak 465
Pathway Student Visas Update	Visa Pak 245
Further advice – insufficient funds for a pathway student visa	Visa Pak 286
Manaaki New Zealand Scholarships - Best Practice	Visa Pak 600
Guidelines on AMS Alerts and Warnings	Internal Amendment Circular (IAC) 16-01
Assessing Bona Fides Application Criteria	Internal Amendment Circular (IAC) 13-09

Assessment Template

Student Visa Assessment Template

Steps

1. Receive allocated application in AMS workflow.

- An Immigration Manager (IM) will transfer an SV application into your workflow in AMS.
- Open the application in AMS and corresponding application documents (either hardcopy, IGMS or via VAC portal).

2. Check data entry and lodgement requirements are complete.

- Check the correct application type has been raised based on the details declared in application and in the Offer of Place.
- Client details and family tab on AMS must be completed.
 - See SOP [Update a client profile in AMS for an application](#)
- Ensure that all contacts have been added.

- See SOP [Lodge application \(online\)](#)

- Check lodgement screen has been completed.

Note: Any errors identified after lodgement from a Support Officer should be fed back through appropriate channels.

Note: If at any point in the assessment process you determine that the application has been created under the incorrect category, consider whether [E3.30\(b\)](#) applies. Do not close substantive application until application is to be decided and link the applications.

3. Manually triage application.

- Manually initiate a risk assessment by clicking 'Initiate Assessment'. See SOP [Work with an application's risk assessment](#) and SOP [Triage visa applications](#)
- If triage has not been initiated or is showing as pending, push F5 to initiate assessment. See SOP [Triage visa applications](#) .

4. Open the Student Visa Assessment Template

- The [Student Visa Assessment Template](#) should be completed for the assessment of these applications.

Note: Record your partial assessment in AMS. See SOP Copy and save visa assessments. Onshore applications require a full assessment prior to a PPI. Offshore applications follow [IAC 13-09](#) and do not assess bona fide, health, character if a substantive is not met.

5. Check if identity resolution is complete

- Follow SOP [Search a client in AMS](#)
- Follow SOP [Assess identity](#)
- Check for warnings (Identity resolution outcomes are recorded here)

Note: Check the Resolution Status column on the Applicant(s) screen in case of pending identity resolution. If this is pending, assessment of the application may be continued but identity resolution must be completed before the application is finalised. See SOP [Waiting for Identity Resolution](#) . These are generally indicated by an AMS warning.

If...	Then...
No concerns are identified regarding the applicant's identity	Go to Step 6

Concerns are identified regarding the applicant's identity	Note the concerns in the assessment template Go to Step 6
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Note: If any significant changes are made to the client or application details (such as contacts), manually triage the application (i.e., initiate a risk assessment).

6. Assess Offer of Place or Confirmation of Enrolment – [U3.5](#) and [U3.7](#)

Note: If you are assessing an SV for a pathway student you will also need to assess the applicant against [U14.5.1](#)

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- ▼ [Undertake an assessment based on the type of SV using the instructions in the table below: \(Click to expand\)](#)

•	
If the SV type is...	Then...
Full Fee Paying; or English language Studies	Assess offer of place under U3.5 or U3.7 requirements.
Pathway student visa	Assess offer of place under U14.5.1 requirements.
Study Abroad	Assess offer of place under U3.5 but offer of place must say it's Study Abroad.
Exchange - Tertiary	Assess evidence under E11.55.1 . • Offer of Place will usually say Certificate in Proficiency – Exchange and must show they have been accepted into an approved student exchange scheme by the scheme organiser. • Does not need statement per U3.5(c) as students are domestic. • Do not ask for evidence from the offshore exchange partner. You do not need to see evidence that the specific exchange is approved. The Offer of Place from a participating New Zealand Education Provider is enough. • Refer to Visa Pak 96 for further information on Exchange students.

Exchange – Secondary Exchange Programme Organisation (EPO)	- Do not need to provide an offer of place as the EPO is responsible for the student and they can attend any school whether it is a Code signatory or not. - The EPO can find a school in zone once the homestay is organised and they can move the student to another school if required. - Refer to Visa Pak 96 for further information on Exchange students.
Exchange – Secondary School to School.	Assess offer of place as per U3.5 . - The offer should confirm that it is for an exchange and include the name of the overseas school. - The New Zealand school must be a signatory to the Code of Practice for the Pastoral Care for International Students (Code). - Exchange students are domestic – the offers of place do not have to contain the statement at U3.5(c). - Refer to Visa Pak 96 for further information on Exchange students.

If...	Then...					
Offer of place or confirmation of enrollment meets requirements	Go to Step 7					
Offer of place or confirmation of enrollment does not meet requirements	Check the applicant's status					
	<table> <tr> <th>If the applicant is...</th><th>Then...</th></tr> <tr> <td>Onshore</td><td>Note the concerns in the assessment template Go to Step 7</td></tr> <tr> <td>Offshore</td><td>Go to Step 20</td></tr> </table>	If the applicant is...	Then...	Onshore	Note the concerns in the assessment template Go to Step 7	Offshore
If the applicant is...	Then...					
Onshore	Note the concerns in the assessment template Go to Step 7					
Offshore	Go to Step 20					

7. Assess Tuition Fees - U3.10

- ▼ *Assess the applicant's circumstances against the requirements at U3.10 as listed below: (Click to expand)*

•	
If...	Then...

Student is exempt from requirement to provide evidence as per U3.10(d)	Confirmation required that the programme of study is exempt from fees or that the student is exempt from paying any fees. Refer to U3.10(d)(i) through (vi) .
Student has provided a receipt from their education provider for evidence of tuition fee payment	Assess this in line with U3.10(a)
Student has not provided a receipt from their education provider for evidence of tuition fee payment and is offshore	Note in initial assessment and follow an AIP process if approving. U3.10(b) .
Student has not provided a receipt from their education provider for evidence of tuition fee payment and is onshore	Note the concerns in the assessment template
Exchange student	For both EPO and school to school exchange these are paid to their home institution or EPO provider, so no fees are paid to the NZ provider. You do not need to see the fee receipt from their home institution.

Note: Approval in Principle (AIP) for tuition fees is only applicable to offshore student visa applicants.

If...	Then...	
No concerns are identified regarding U3.10	Go to Step 8	
Concerns are identified regarding U3.10	Check the applicant's status	
	If the applicant...	Then...
	Onshore	Note the concerns in the assessment template Go to Step 8

		Go to Step 8
	Offshore	Go to Step 20

8. Check Progress and Attendance

If...	Then...	
The student is a first-time student in New Zealand; or The student is a returning student at a school	Go to Step 9	
The student is a returning student at a university or Te Pukenga (Polytech).	If...	Then...
	No concerns are identified	Go to Step 9
	Concerns are identified	Go to Step 8a
The student is a returning student at a private training establishment	Check their attendance and progress over their last student visa.	
	If...	Then...
	No concerns are identified	Go to Step 9
	Concerns are identified	Go to Step 8a

8a. Check the applicant's status

If the applicant is...	Then...
Onshore	Note the concerns in the assessment template Go to Step 9
Offshore	Go to Step 20

9. Check Accommodation Requirements for fee-paying students under the age of 18 – U3.15

If...	Then...
The student is over the age of 18	Go to Step 11

The student is under the age of 18 and U3.15 is met	Go to Step 10	
The student is under the age of 18 and U3.15 is not met	The student must provide a statement from their education provider confirming that the student's accommodation is compliant with the Education (Pastoral Care of Tertiary and International Learners) Code of Practice 2021. Check the applicant's status	
	If the applicant...	Then...
	Onshore	Note the concerns in the assessment template Go to Step 10
	Offshore	Go to Step 20

Note: For Exchange students under 18 please assess under [E11.55.20](#)

10. Check Guardianship Requirements for fee paying students under the age of 10 – U3.30

If...	Then...	
The student is over the age of 10; or The student is under the age of 10 and U3.30 is met	Go to Step 11	
The student is under the age of 10 and U3.30 is not met	They must be living in New Zealand with their legal guardian unless they are enrolled in a school hostel approved by the Code Administrator.	
	If the applicant...	Then...
	Onshore	Note the concerns in the assessment template Go to Step 11
	Offshore	Go to Step 20

Note: Children up to the age of 13 require a guardian contact to be recorded in AMS as a contact. Where the student is over the

age of 10, and has no associated guardian, record the education provider as the guardian.

11. Assess funds for maintenance and outward travel – [U3.20](#) and [U3.25](#)

Note: If you are assessing an SV for a pathway student you will also need to assess the applicant against [U14.5.1](#)

- ▼ [Determine whether applicant has provided evidence that demonstrates they have sufficient funds for maintenance and outward travel](#) ▶ [\(Click to expand\)](#)

-

If...	Then...
Applicant is demonstrating funds held in either their name or another family member	Assess in line with U3.20.20 .
Applicant holds a scholarship or loan covering funds from a foreign government (central government only).	s 6(c)
Applicant has provided Sponsorship Form (INZ 1025)	Sponsor must be acceptable as per E6.5 Sponsor must genuinely hold sufficient funds for each student they are supporting (U3.20.5) Sponsor must be bona fide (U3.20.5 and U3.20.15).
Applicant has provided a Financial Undertaking Form (INZ 1014)	Must be offshore application (before student's arrival in New Zealand). Must genuinely hold sufficient funds (U3.20.10) Must be bona fide (U3.20.10 and U3.20.15) Onshore applications may also provide a Financial Undertaking if provided with initial offshore application (U3.20.10e).
Study Abroad	Will usually be personal funds but check to see if accommodation has been pre-paid and if so, deduct from funds required.

Scholarship that is not from a foreign government	Consider as funds held on behalf. Assess in line with U3.20.20 . Will need to be verified.
Pathway Student	Check the evidence of funds provided meets the requirements set out in U3.20 for the first year on the intended pathway. Check they have the ability to fund second or subsequent years on the pathway (U14.5.1).
Exchange student.	Assess as per E11.45(b) . If accommodation has been prepaid, then the NZ education provider should confirm the cost, and this can be deducted from the amount listed under U3.20 . For travel - despite note under E11.55.1(b) , outward travel requirements may be met by providing evidence under E3.20(a)&(b) .

If...	Then...	
U3.20 and U3.25 are assessed as met	Go to Step 12	
U3.20 and U3.25 are assessed as not met	Check the applicant's status	
	If the applicant...	Then...
	Onshore	Note the concerns in the assessment template Go to Step 12
	Offshore	Go to Step 20

12. Assess Alerts and Warnings

Assess any active alerts and warnings associated with the applicant, the education provider, or the applicant's contacts to determine relevance. If relevant, address with appropriate verification, RFI or PPI action.

See [IAC 16/01](#) and [Visa Pak 531](#) (Changes to requirement to assess expired alerts and warnings in visa processing) for guidelines on AMS Alerts and Warnings.

13. Undertake a Risk Assessment

- Follow SOP [Assess Risk and Conduct Verification](#)
- ▼ Review the following SOPs for additional guidance ▶ [\(Click to expand\)](#)

- [Work with an application's risk assessment](#)
- [Triage visa applications](#)
- [Risk Level/Verification Check Summary](#) (guidance on verification and when to consult the Verification Team)

- If general risk treatment/s are inconclusive, consult with Risk and Verification to determine the best course of action. Risk Treatment and Risk Treatment Levels are detailed in the [Risk Classification in ADEPT guide](#).

Note: If the verification outcome is conclusive, make the decision on the application as quickly as possible

If...	Then...
No risk identified	Go to Step 14
Risk identified	Note the concerns in the assessment template Go to Step 14

14. Determine if the applicant is a Bona Fide applicant [E5](#)

Review documentation and statements provided with the application and assess in line with [E5](#) and [IAC 13-09](#)

If...	Then...	
Bona fide concerns are not present	Go to Step 15	
Bona fide concerns are present	Check the applicant's status	
	If the applicant...	Then...
	Onshore	Note the concerns in the assessment template Go to Step 15

	Offshore	Go to Step 20
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15. Determine if the applicant meets the Health requirements for temporary entry

Refer to instructions for health at [A4](#)

Refer to [IHS and Health SOPs](#) for detailed process guidance depending on health requirements or health case outcome.

If...	Then...
Health concerns are not present	Go to Step 16
Health concerns are present	Note the concerns in the assessment template Go to Step 16

16. Determine if the health insurance declaration needs to be checked – [U3.45](#)

If...	Then...
The application has been submitted via IGMS; or The applicant is a PhD student; or The applicant is an Exchange Student	No need to check the health insurance declaration Go to Step 17
The application has been submitted on a paper form	Check insurance declaration has been ticked before proceeding to Step 17

Note: If an application is reraised from Exchange to Full Fee Paying the completion of the Insurance Declaration as per section C20 of the Student Visa Application form ([INZ 1012](#)) is required.

17. Determine if the applicant meets the Character requirements for temporary entry

Refer to instructions for character at [A5](#)

If...	Then...
Character concerns are not present	Go to Step 18
Character concerns are present	Note the concerns in the assessment template Go to Step 18

18.

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Note: Ensure FCC SOP is also followed, if applicable.

If...	Then...
NSC is not required	Go to Step 19
NSC is required	Go to Step 18a

18a. Ensure that the NSC request is submitted correctly into the portal

Note: If an NSC has already been submitted into the portal, ensure that all required information was sent through. Monitor the status of the request and take action as recommended in the NSC User Guide

- ▼ Determine if a request can be put through the portal with the information on hand ► [\(Click to expand\)](#):

-

If the application...	Then...
Is an IGMS application	The IGMS application contains all information required for an NSC for the Principal Applicant only (IO to check this before submitting NSC – if application is incomplete, send the relevant NSC forms (e.g., INZ 1209, INZ 1200 etc.) to applicant as outlined in box below)
Is a paper application	Check that INZ 1209 – National Security Check Form has been sent to the applicant during lodgement and whether information has been received for all included applicants.
Contains additional applicants that require NSC	If any additional applicants require an NSC – you will need to request completed INZ 1209 from them before submitting to the portal.

If...	Then...
All NSC required information is present	Submit NSC - Refer SOP Submit third party request - NSC and NSC User Guide Note: IOs should continue processing the application as

	normal while NSC assessment is pending as there may be other concerns that need to be resolved, or application may be declined on other grounds. Application cannot be approved, however, until NSC response is received. Go to Step 19
Further information is required to submit the request in the portal	Take note of what information is required in the assessment template Go to Step 19

19. Consider False, Misleading or Withheld Information

Refer to instructions at [A24](#)

If...	Then...
You have not identified false, misleading, or withheld information	Go to Step 20
You identify false, misleading or withheld information in a current application Note: Ensure you record A24 assessment notes in the assessment template	Refer to SOP - (1) Consider false, misleading, or withheld information in current visa application (not associated to an Expression of Interest (EOI) containing false information) Go to Step 20
You identify false, misleading or withheld information in a previous application. Note: Ensure you record A24 assessment notes in the assessment template	Refer to SOP - (2) Consider false, misleading, or withheld information in a previous visa application or un-associated Expression of Interest (EOI) Go to Step 20

20. Determine if a Request for further information (RFI) or a Potentially Prejudicial Information (PPI) letter is required

Review the information available and:

- Determine if further information is required in the form of an RFI or PPI letter; or
- Determine if a decision can be made based on the information on file

If...	Then...
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No further information is required; and The applicant has satisfied all relevant instructions and other requirements	The application is decision ready Note: Consider if the applicant is offshore and whether Approval in Principle (AIP) is required Go to Step 22								
Further information is required to determine if instructions are met; and s 6(c)	Consider the following: • Call Education Provider (EP) if there are EP related issues (E.g., Offer of Place or tuition fee receipt); or • Follow SOP Request further information • Place a Bring Up appropriate date from the time the request has been made. • Change the application location to Non-actionable Wait for a response or until the due date has lapsed. Undertake checks to determine if the applicant has responded to the RFI letter (E.g., AMS notes from the contact centre, uploaded documents in IGMS and email communication) Repeat Step 20								
It is determined that instructions are not met; or No response received after RFI; or Further information is required to determine if instructions are met; and s 6(c)	<table> <tr> <th colspan="2">Check the applicant's status</th></tr> <tr> <th>If the applicant...</th><th>Then...</th></tr> <tr> <td>Onshore</td><td> • Follow Communicate potentially prejudicial information (PPI) SOP • Place a Bring Up appropriate date from the time the request has been made. • Change application location to Non-actionable Wait for a response or until the due date has lapsed Go to Step 21 </td></tr> <tr> <td>Offshore</td><td>Go to Step 20a</td></tr> </table>	Check the applicant's status		If the applicant...	Then...	Onshore	• Follow Communicate potentially prejudicial information (PPI) SOP • Place a Bring Up appropriate date from the time the request has been made. • Change application location to Non-actionable Wait for a response or until the due date has lapsed Go to Step 21	Offshore	Go to Step 20a
Check the applicant's status									
If the applicant...	Then...								
Onshore	• Follow Communicate potentially prejudicial information (PPI) SOP • Place a Bring Up appropriate date from the time the request has been made. • Change application location to Non-actionable Wait for a response or until the due date has lapsed Go to Step 21								
Offshore	Go to Step 20a								

▼ **20a. Determine if PPI letter is required for an offshore applicant** ▶ [\(Click to expand\)](#)

- A decision can usually be made based on the information available without sending a PPI letter unless one of the scenarios at [E7.15.1](#) apply.
- Review [E7.15.1](#) , [Visa Pak 129](#) and [IAC 11-09](#) , pages 4 and 5 (superseded by [E7.15](#)).

If...	Then...
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PPI letter is not appropriate	The application is decision ready Go to Step 24
PPI letter is appropriate	- Follow Communicate potentially prejudicial information (PPI) SOP - Place a Bring Up appropriate date from the time the request has been made. - Change application location to Non-actionable Wait for a response or until the due date has lapsed Go to Step 21

21. Undertaking further assessment after a PPI letter has been sent

Undertake checks to determine if the applicant has responded to the PPI letter (E.g., AMS notes from the contact centre, uploaded documents in IGMS and email communication)

Where a response has been provided, assess the information against the relevant instructions or requirements as stated in the RFI/PPI letter

If the applicant...	Then...
Has provided a response to the PPI letter; and Has now satisfied all relevant instructions and other requirements	The application is decision ready Note: Check if the applicant is offshore and whether Approval in Principal (AIP) is required Go to Step 22
Has provided a response to the PPI letter; and It has been determined that instructions are still not met; or No response to the PPI letter was received	The application is decision ready Go to Step 24

Note: Record your partial assessment in AMS. See SOP Copy and save visa assessments.

22. Determine expiry date – [U6.30](#) or [U14.10b](#) for pathway visas.

Review Offer of Place and immigration instructions at [U6.30](#)

Note: Please ensure any transfer to a new passport is recorded in AMS and the appropriate information to the E-visa letter.

23. Determine Work Rights – U13

Review Offer of place and immigration instructions at **U13** to determine work rights.

24. Submit application for Quality Control (QC) check (if required)

- QC may be required before application can be completed – check with TA if unsure.
- Any Border Alert Referrals (BART) and/or Approval in Principle letters must be drafted prior to submitting the application for QC.
- Refer to SOP [Submit an application for Quality Control \(QC\) check](#) .
- If declining the application, draft decline letter before submitting application for QC.
- Wait for outcome of QC before continuing to next step.

Note: The character question in the determination tab must be completed prior to submitting for QC.

25. Finalise the application and communicate the decision

- Complete the application in AMS using the following steps, depending on the outcome for the application.
- A final assessment must be pasted into AMS under the appropriate application.

Note: If a visa is being granted as an Exception to Instructions (ETI) or if an ETI has been considered but not granted ensure sufficient rationale is in your assessment. For the determination tab question, in the ETI pop-up you may out the reason for the exception or for not granting exception. Consider adding a note "Refer to assessment notes under ANxxxxxxx for further information."

Note: If character determination box is ticked and 'yes' is entered it will ask for a Police Certificate. If this has already been provided you can then click 'no'.

If...	Then...
The decision is to Approve in Principle	Follow SOP Approve in Principle Select the correct template letter from TLS; • V26d Student Visa Approval in Principle Letter Once a response has been received, make your final decision on the application, and refer to the appropriate steps based on the decision outcomes below. End of process
The decision is to Approve the application	Follow the Approve applicant (issue eVisa and notify applicant) SOP. Ensure the correct visa conditions have been selected. Note: Do not add first entry dates for offshore students. If they have applied early amend their start date to two months prior to course start date. Select the correct eVisa/template letter from TLS; either: For Full-fee Paying or English Language Studies categories:

	• V402a Student e visa approval letter For Pathway Student Visas • V423 Pathway Student eVisa Approval Create and upload eVisa letter, include transfer details if granting shorter visa due to passport expiry. Refer to immigration instructions E3.10 for passport validity requirements. End of process
The decision is to Decline the application	Follow SOP Decline application (Temporary Entry) Complete and upload decline letter. • V46SD Student visa decline standardised decision letter. (Offshore only) • V46 Student visa decline letter. (Onshore or where there is no applicable standardised letter content) End of process
The applicant has requested to withdraw the application	Follow SOP Withdraw application . • Staff should not expressly encourage or suggest the withdrawal of applications, but should agree with withdrawing an application when requested by the applicant. • Where an applicant holds an interim visa, they should understand this and the potential impacts of the withdrawal of their application on their visa status. Complete and upload withdrawal letter. • V199 Withdrawn application End of process

END

See Also

[Student visa processing in AMS](#)

[Assess application for dependent child of a worker \(AEWV or ESWV or SPEV approved under WS2.1.1\(o\)\)](#)

[Process a Variation of conditions request \(Student visa in AMS\)](#)