

Global Process Manual

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Student visa - Assess application

Assess Application (International Student Visa)

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When to use

When an International Student Visa (ISV) application has been assigned to you for assessment.

Role

- Immigration Officer (IO)

Guidelines

Student visa applications are submitted online by the applicant and are assessed by an Immigration officer in ADEPT using **application-based** assessment. This means that all assessment activities generated within the application will be allocated to a single officer to assess s 6(c)

- ▼ **Related resources (Click to expand)**

Student visa related resources

English language students	VisaPak 105
Remaining enrolled during thesis marking (Masters only)	VisaPak 123
Aviation Student Instructions and U3.10 Acceptable evidence of paying tuition fees	VisaPak 199
Exchange Students.	VisaPak 155
Self-employment on student visas	VisaPak 400
Reminders on Offers of Place	VisaPak 270
Reminder - Ensuring that a student has a Pathway Student Visa offer of place before granting a Pathway Student Visa	VisaPak 313

Overarching visas for New Zealand Certificate in English language and English language training schemes	VisaPak 360
Year level on student visa labels	VisaPak 227
Work rights for students pre- and post-course	VisaPak 493
Student visas and work rights	VisaPak 465
Further advice – insufficient funds for a pathway student visa	VisaPak 286
Guidelines on AMS Alerts and Warnings	Internal Amendment Circular (IAC) 16-01
Manaaki New Zealand Scholarships – Best Practice	VisaPak 600
Work right conditions for students undertaking a Masters by Research	VisaPak 625
Assessing Bona Fides Application Criteria	Internal Amendment Circular (IAC) 13-09

Prerequisites

- An International Student Visa (ISV) application has been submitted in ADEPT; and
- The application has been assigned to you to assess; and
- The application status is **Under assessment**

Note: For Student visa applications in AMS – follow SOP [Assess and decide an application for a Student visa](#)

Steps

1. Open the Student 'Eligibility Assessment Activity'

The main application title will stipulate the type of Student Visa you are assessing. (E.g., Student visa – Fee paying)

Applications will only populate **Assessment activities** in response to manual assessments that the system has flagged for the officer to assess.

- Click on the **Assessment activities and RFI** tab and open the **Student eligibility assessment activity**.

General
Visa Applicants
Additional Information
Assessment Activities and RFI
Documents
Waiting On
Document Validation Activities and...
...

SV00031605 FirstName LastName Student Visa - Fee Paying Student Eligibility - Saved
Assessment Activity

Study details
Student EP/Courses
Funds
Bona fides
Proposed Visa
Outcome summary
Documents
Related

2. Begin your initial assessment (Check for any risks identified and review assessment criteria)

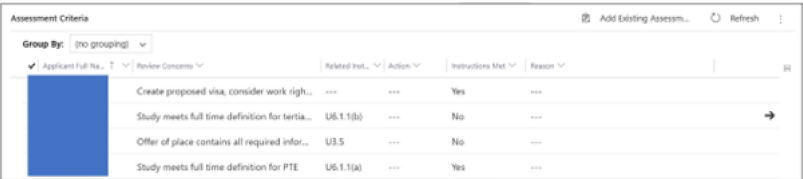
- From the main application screen, click on the **Risk and Risk monitoring activities** tab to review identified risks (and any action taken) in the **Risk activities** grid

Note: System identified risks (where present) will proceed to be surfaced to the processing officer in the **Risk assessment activity**

- Check the **general notes** of the application for any risk related notes
- See further guidance in the [Verification toolkit](#)

Note: A full assessment of the risk and associated risk rules is not required at this stage, but a review of the risks present is appropriate to consider before undertaking the assessment of substantive criteria in the steps below

When the system identifies that a manual assessment is required, it will be displayed as **assessment criteria** that will be generated within each of the **assessment activities** and associated **assessment activity tabs**. Each **assessment criteria** requires an assessment against specific immigration instructions.



Applicant Full Name	Review Comments	Related Inst.	Action	Instructions Met	Reason
	Create proposed visa, consider work right...			Yes	
	Study meets full time definition for tertiary...	U6.1.5(b)		No	
	Offer of place contains all required information...	U3.5		No	
	Study meets full time definition for PTE...	U6.1.5(a)		Yes	

From the list below, select the **Assessment activity tabs** that are present within the **Student Eligibility Assessment Activity**. A dropdown will appear with a list of **Assessment criteria** that may need to be assessed.

The type of Student visa, the responses in the application form and a series of system checks will determine which combination of assessment criteria will populate.

Important note: You only need to assess the criteria that the system has flagged for you to assess.

Review the **Student visa assessment criteria** below against the criteria present in the application.

Click on the relevant **Assessment activity tabs** below to view the related processes

- ▼ **Study details tab – Substantive (core) SV criteria** (Click to expand)

Study details tab - Substantive (core) SV criteria

List of substantive (core) SV assessment criteria that may populate within the Study details tab		
Common across most SV types	U3.1(a)(iv)	Attendance and progress is acceptable ^②
	U3.10	Tuition fees are paid in full, applicant is exempt, or eligible for AIP ^②
	U3.15	Under 18-year-old meets accommodation requirements ^②
	U3.30	Under 10-year-old meets guardian or domestic student / hostel requirements ^②
	U3.5	Offer of place contains all required information ^②
	U3.7	Confirmation of enrolment (or OOP) contains all required information ^②

	U5.1(e)(i)	The offered programme of study or training scheme complies with foreign student requirements. ②
	U6.1.1(a)	Study meets full time definition for PTE ②
	U6.1.1(b)	Study meets full time definition for tertiary institution ②
	V3.100.35	Not the holder of a guardian visitor visa ②
		Offshore Education Agent has not been matched to reference data ②
		Overseas school has not been matched against reference data ②
		Declared course has not been matched against NZQA reference data ②
Ex-scholarship student only	U7.1	Applicant has transferred from NZ Govt Scholarship SV to Fee paying SV and meets all requirements ②
Pathway students only	U14.5.1	Sufficient evidence provided to show ability to fund subsequent years on the remainder of study pathway ②
	U14.5(a)	Education provider/s are a qualifying Pathways provider ②
	U14.5.1(a)(ii)	Offer of place for each programme of study and joint letter of support (if more than one EP) have been provided ②
	U14.5.1(c)	English language requirements have been met for pathway students ②
Exchange students only	U4.15(b)(ii)	Exchange Scheme is approved by Ministry of Education ②
	E11.45	Acceptable evidence of pre-paid living expenses arranged by exchange provider ②
	E11.55(b)	Applied from outside New Zealand or special reason why not ②
	E11.55.1	Applicant has provided evidence confirming enrolment in approved exchange scheme ②
Foreign Government supported applicants only	U12(c)	Acceptable Foreign government letter undertaking to pay tuition fees and living expenses ②
	U12.1	Country providing support has education agreement with NZ ②
NZ Government Scholarship students only	U3.20(b)(i)	Evidence of NZ Government scholarship ②

- ▼ Funds tab – Substantive (core) SV criteria (Click to expand)

Funds tab - Substantive (core) SV criteria

List of substantive (core) SV assessment criteria that may populate within the Funds tab	
U3.20	Sufficient funds available for maintenance ⓘ
U3.20.20	Funds are available and from a genuine source ⓘ
U3.20.35	Sufficient funds to pay for maternity services ⓘ
U3.20(a)	Satisfied applicant has sufficient evidence of funds to maintain themselves in New Zealand ⓘ
U3.25	Means to cover outward travel ⓘ
U3.20.10(a)	Financial undertaking was provided before applicants' arrival in NZ ⓘ
U3.20.10(d) (ii)	Third party genuinely holds sufficient funds for each student they are supporting ⓘ
U3.20.10	Financial undertaking was provided by same guarantor as initial student visa ⓘ
U3.20.15	Third party is bona fide (genuine intention to meet financial obligations) ⓘ

- ▼ **Bona fides tab – NOT substantive (core) SV criteria (Click to expand)**

Bona fides tab - Substantive (core) SV criteria

List of assessment criteria that may populate within the Bona fides tab (not considered to be substantive (core) SV criteria)	
<i>Note: The bona fides related criteria that populate are determined by the risk level</i>	
E5.1(a) & E5.1(b)	Satisfied applicant is bona fide ⓘ
E3.15 & E3.20	Satisfied applicant has fulfilled the purpose of and met conditions for any previous or current temporary visa ⓘ
E5.1(a)	Satisfied applicant is likely to meet Student Visa conditions ⓘ
E5.1(b)	Satisfied applicant is not, or is unlikely to be, unlawful ⓘ
E5.1(b)	Satisfied there are no concerns with ties to home country and/or NZ ⓘ
E5.1(b)	Satisfied with future plans on completion of study ⓘ

E5.1(b)	Satisfied with previous study/employment ^②
E5.10(a)(iii)	Satisfied applicant has no unlawful family in New Zealand ^②

3. Undertake a manual assessment of the criteria present

- Generate the assessment activity PowerBI report to review the information provided by the applicant (see [user guide](#) for functional steps)
- Click on the **Documents** tab to review the documents provided by the applicant
- Consider checking any **Additional document activities (ADA)** (see user guide for functional steps)
- Check the **Student EP/Courses** tab to validate and update any information as required. Ensure that this information is up to date, accurate and complete (Refer to **Amend a Student EP/Course record on a student visa** section of the [user guide](#) where appropriate).
- **▼ To view all contact types – see the steps below (Click to expand)**

- To view any financial guarantor or sponsor contacts related to the application, navigate to the visa applicant record, then click on the Related tab followed by Application Contacts.
- To view an Education Agent Organisation that has assisted with the visa application, navigate to the visa applicant record, then click on the Related tab followed by Assistance Details.
- To view an Education Agent Organisation that has only assisted the student with obtaining the offer of place, navigate to the application record, then click on the Related tab followed by Visa Information.

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Using the information above, assess the application against the **assessment criteria** and related immigration instructions.

Important note for Offshore ISV applications only: If at least one of the substantive (core) assessment criteria above (*study details and funds*) have been assessed as not met, **no further assessment of any remaining criteria and/or assessment activities is required.** (The application can move forward to be declined with no PPI – actioned in Step 4) See [IAC 13-09](#)

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4. Resolve assessment criteria

Follow [Rationale guidance document \(ISV\)](#) to record rationale

Where appropriate, complete the **Instructions met** and **Reason** fields to ensure all assessment criteria have been marked correctly. Ensure clear, logical and accurate rationale is provided to support decision making.

Do not complete the outcome field on the **Outcome summary** tab of the **Student Eligibility Assessment Activity** at this stage

Note: In cases where an Approval in Principle (AIP) is appropriate, ensure clear notes are added into the **Reason** field of the relevant assessment criterion

If	Then	
Instructions are assessed as met	Select Yes in the Instructions met field of the assessment criterion. The system will accept that the applicable instruction has been assessed as met (no assessment concern will be raised)	
Instructions are assessed as not met	- Check if the criteria that have been assessed as not met, are included in the substantive (core) SV assessment criteria (listed above) - Check the applicant's status (e.g., IN, OUT, NEWC etc.)	
	Scenario	Then
	The criterion is included in the substantive (core) SV assessment criteria; and The applicant is offshore	Once it has been determined that at least one of the substantive criteria is not met – no further assessment of remaining criteria is required. s 6(c) - Select No in the Instructions met field (for the substantive criterion you have determined is not met) - Add notes to the Reason field to support your decision (including – but not limited to, consideration of an <i>Exception to instructions (ETI) and/or Limited visa (LV) where applicable</i>) - Add a new assessment concern – SV offshore – no PPI - The Instruction met and Reason fields for the remaining assessment criteria can be left blank - Click on Save and close - Update the Initial outcome field on the General tab of the application to Decline – No PPI - Click on Word templates from the toolbar along the top of the screen to draft decline letter. Do not set to publish. Go to Step 11
	All other scenarios (whether onshore or offshore)	- Select No in the Instructions met field. - The system will automatically raise an assessment concern for this to be addressed in the RFI/PPI activity

5. Raise manual assessment concerns (if required)

If you identify a concern that has not been addressed in the assessment activities or criteria above, raise a manual assessment concern to undertake further investigation and assessment of the concern.

Raise manual concerns in the following scenarios:

- ▼ **Failed system check (Interim process): Attendance and progress is acceptable** (Click to expand)

Failed system check (Interim process): Attendance and progress is acceptable

If	Then
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The Attendance and progress is acceptable criterion is present (and has already been addressed)	Criterion was triggered correctly. No further action required regarding assessment under U3.1(a)(iv) .	
The Attendance and progress is acceptable criterion is not present	Determine further action The system checks for this criterion should capture most cases, however, check if either of the scenarios below are applicable to the applicant: <i>applicant held a student visa in the last year but it expired due to another type of visa being issued (expiry date stay in the future).</i> <i>applicant held a student visa in the last year but the visa has been cancelled (expiry date stay in the future).</i>	
	If...	Then...
	At least one of the scenarios above apply to the applicant	- An assessment against U3.1(a)(iv) is required. - Refer to Attendance and progress is acceptable ② to determine if instructions are met. - If instructions are assessed as not met – raise a manual concern under U3.1(a)(iv)
	Neither of the scenarios above apply to the applicant	No further action required regarding assessment under U3.1(a)(iv) .

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• ▼ **If the applicant has requested to add a Student guarantor whilst an application is Under assessment (Click to expand)**

The applicant will need to provide a completed INZ1014 form. If this has not been provided, raise the Manual assessment concern related to U3.20(b)(iii) to request this from the applicant.

Once the applicant has provided the required information - you will need to undertake manual identity resolution for the guarantor and add them as a contact into the ADEPT application.

There is a temporary bug in the system limiting the functionality for these contacts to be added into ADEPT – to be updated in due course. If this scenario applies to your application, see a technical advisor/Business application specialist to request an update.

• **False or misleading information provided, or relevant information was withheld** ②

If...	Then...
A manual assessment concern is required	Manually create an assessment concern (see user guide for functional steps) Go to Step 6
A manual assessment concern is not required	Go to Step 6

6. Review and assess other activities

If there are other Assessment activities present, ensure that these are assessed appropriately.

- [Assess a Character assessment activity](#)
- [Assess a Sponsorship assessment activity](#)
- [Assess a Risk assessment activity](#)



- [Health related assessment criteria](#)
- [Additional document assessment activity](#)

Important note: At this stage, the **outcome** field on the **Outcome summary tab** of the **Student Eligibility assessment activity** should not be completed

7. Undertake further action where an Assessment Activity Validation (AAV) is required

If...	Then...
A high-risk rule is present that requires an AAV (i.e., The Treatment required field for the high risk rule has been marked as No and the	• Ensure that the outcome of the Risk assessment activity has been marked as Instruction met as this will generate the AAV for a Verification officer to address <i>Note: If the AAV request is not validated, the Verification</i>

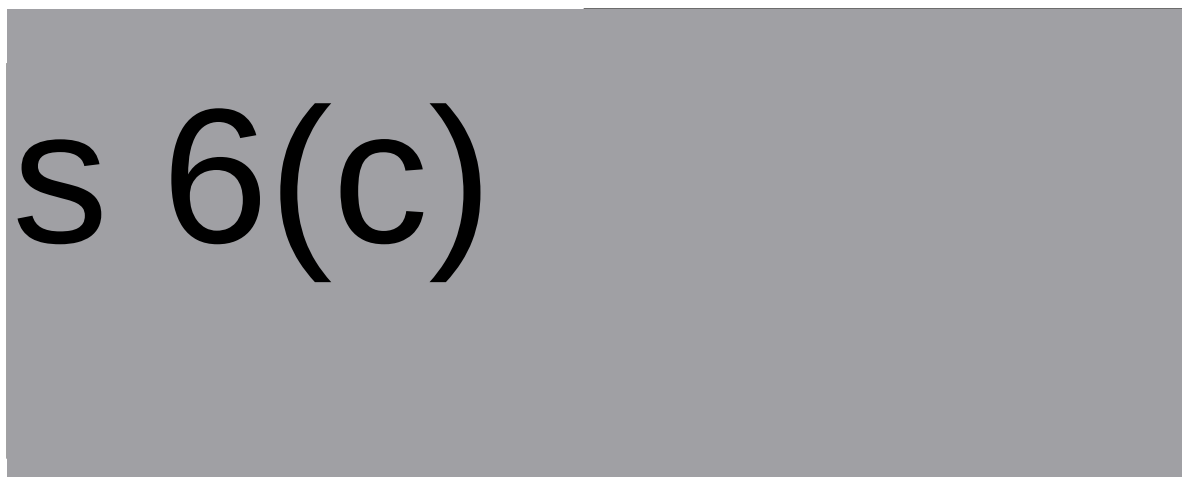
Reason/Outcome field has been marked as Risk not present)	officer will create a new Risk assessment activity to be addressed. Refer back to SOP Assess a risk assessment activity Go to Step 8
AAV is not required	Go to Step 8

8. Check or create proposed visa conditions (where required)

If...	Then...
All assessment criteria have been marked Yes in the Instructions met field; and No assessment concerns are present	- Confirm that the details held in the Student EP/Courses tab are correct (these details will be added into the visa conditions. Refer to Amend a Student EP/Course record on a student visa section of the user guide where appropriate) - Follow SOP Review and/or create visa conditions Go to Step 9
At least one assessment criterion has been marked No in the Instructions met field; and/or At least one assessment concern is present	Go to Step 9

9. Determine further action based on the outcome of each assessment activity

Note: Ensure that all outcome fields are completed (see user guide for functional steps) for all assessment activities except for the **Student eligibility assessment activity**



	Determine further action			
	If	Then		
	Quality check required	Go to Step 11		
	Quality check not required	If the applicant is using a Licenced Immigration Advisor (LIA) – check if there is a warning relating to the LIA that needs to be assessed and mitigated. • If the risk cannot be mitigated go to SOP Decide SV application . • If the risk can be mitigated or no LIA/risk is present, proceed to the steps below • Navigate to the Outcome summary tab and select Instruction met in the Outcome field of the Student eligibility assessment activity. The application will proceed to approve. End of process		
	<i>Note: If you are unsure if a quality check is required, see a TA</i>			
The application can be approved in principle (AIP)	s 6(c) S 6(c) Navigate to the Outcome summary tab and select Require further info in the outcome field of the Student eligibility assessment activity (see user guide for functional steps) Go to Step 10			
There is at least one Assessment concern present; and Instructions are assessed as not met	Navigate to the Outcome summary tab and select Require further info in the outcome field of the Student eligibility assessment activity (see user guide for functional steps) Go to Step 10			
Further information is required (RFI or PPI required)	s 6(c) <table><tr><td>If</td><td>Then</td></tr></table>		If	Then
If	Then			

	s 6(c) Manually create an RFI/PPI activity (see user guide for functional steps) Go to Step 10
	s 6(c) Navigate to the Outcome summary tab and select Require further info in the outcome field of the Student eligibility assessment activity (see user guide for functional steps) Go to Step 10

s 6(c)

10. Undertake further action within the RFI/PPI activity

An RFI/PPI activity will be generated automatically when:	- At least one of the outcome fields (of an assessment activity) have been completed with Require further info; and/or - At least one assessment concern or system concern is present
A manually raised RFI/PPI activity will be present when:	s 6(c)

Undertake further action/s based on the assessment concerns present and consider whether further information is required (e.g., Sending an RFI or PPI letter) or whether the application can be decided based on the information available (see user guide for functional steps).

This could include:

- Reviewing assessment concerns
- Sending an RFI/PPI letter to the applicant and reviewing the response (where appropriate)
- Undertaking risk treatment/s
- Assessing new information to determine if instructions are met
- Consideration of an Exception to Instructions (ETI)
- Consideration a waiver
- No surprises fact sheet (NSFS)
- The application is approved in Principle (AIP) (see SOP [Application Approval in Principle](#))

If a manual RFI/PPI activity was raised, ensure that this activity is closed off (complete the outcome field) before proceeding to the steps below.

Note: If an RFI/PPI letter was sent, ensure the due date has passed before proceeding to the steps below. *(If a response is received prior to the due date and no concerns remain, proceed to the steps below)*

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If after RFI/PPI activity	Then						
The application is to be approved (<i>not including AIP</i>)	s 6(c) - Update the activity status of the RFI/PPI activity to On hold and select Pending internal advice as the On hold reason. - Add a general note - s 6(c) s 6(c) - Proceed to the steps below s 6(c) - Proceed to the steps below Determine further action						
	<table><tr><th>If</th><th>Then</th></tr><tr><td>Quality check required</td><td>Go to Step 11</td></tr><tr><td>Quality check not required</td><td> If the applicant is using a Licenced Immigration Advisor (LIA) – check if there is a warning relating to the LIA that needs to be assessed and mitigated. - If the risk cannot be mitigated go to SOP Decide SV application . - If the risk can be mitigated or no LIA/risk is present, proceed to the steps below - Navigate to the Outcome summary tab and select Instruction met in the Outcome field of the Student eligibility assessment activity. The application will proceed to approve. End of process</td></tr></table>	If	Then	Quality check required	Go to Step 11	Quality check not required	If the applicant is using a Licenced Immigration Advisor (LIA) – check if there is a warning relating to the LIA that needs to be assessed and mitigated. - If the risk cannot be mitigated go to SOP Decide SV application . - If the risk can be mitigated or no LIA/risk is present, proceed to the steps below - Navigate to the Outcome summary tab and select Instruction met in the Outcome field of the Student eligibility assessment activity. The application will proceed to approve. End of process
	If	Then					
	Quality check required	Go to Step 11					
	Quality check not required	If the applicant is using a Licenced Immigration Advisor (LIA) – check if there is a warning relating to the LIA that needs to be assessed and mitigated. - If the risk cannot be mitigated go to SOP Decide SV application . - If the risk can be mitigated or no LIA/risk is present, proceed to the steps below - Navigate to the Outcome summary tab and select Instruction met in the Outcome field of the Student eligibility assessment activity. The application will proceed to approve. End of process					

	<i>Note: If you are unsure if a quality check is required, see a TA</i>
The application is AIP	Follow SOP Application Approval in Principle ☺ End of process
The application is to be declined	s 6(c) Go to Step 11

11. Request a quality check (if required)

If...	Then...
A quality check is required <i>Note: All high risk ETI decisions must be sent for a quality check</i>	<i>Note: For decline decisions – draft the decline letter by clicking on Word templates from the toolbar along the top of the main application screen. Do not set to publish.</i> - Follow SOP Request a Quality check (IO) - Go to SOP Decide SV application once Quality check is completed and resolved
A quality check is not required	Go to SOP Decide SV application

END

See Also

[Student visa processing in ADEPT](#)

[Student visa - Decide application](#)

[Assess a Request to create a new contact record](#)