# ZeeFi

# Payment Assist

Education Partner Onboarding
& Training Guide

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# ZeeFi

Australia's fintech partner to the education sector, committed to helping education providers unlock capital and grow enrolments, and removing financial barriers so students can reach their full potential.

## Unparalleled sector-expertise

We understand the challenges and opportunities inherent to the sector, enabling breakthrough solutions tailored to our client's unique needs

## Comprehensive suite of innovative products

Our innovative solutions unlock new opportunities for growth; simplifying and accelerating the customer experience for both students and providers

## Building partnerships for growth

We're focused on the long-term success of our clients as a critical link in the chain providing positive education outcomes for students

## Responsive

We adapt to the uniqueness of every business and student needs to ensure the path to education remains accessible throughout the journey

# ZeeFi Payment Assist

# Product Offering & Features

**ZeeFi**

Education providers can outsource their student payment plans to ZeeFi for end-to-end management. We specialise in delicately managing student instalment plans from set-up, to managing payment failures, hardship situations, and collections.

## Purpose
Affordable study payment plan solution, securing enrolment for student without the stress of upfront course costs.

## Type of borrowers
A student over the age of 18 OR a parent on behalf of the student (terms and conditions apply)

## Payment method
Students must set up a weekly/fortnightly/monthly direct debit. The approved student will provide authority to ZeeFi to pay the tuition fees to the Education Provider

## Plan amount
The course amount plus any related fees from the Education Provider

## Location
Australia wide – all states and territories

## Early repayment
No penalties apply if the loan is repaid earlier than expected

## Plan term
Dependent on the course length and the term set out by the Education Provider

## Type
Principal only, interest free

## Fees
Students may be charged certain fees that are dissolved into their plan – this is decided by the Education Provider. These fees are:
- $50 establishment fee per plan
- $7 monthly management fee
- $35 arrears fee for accounts more than 21 days overdue.
- $15 dishonour fee for each dishonoured payment.

# Application Guide

# Student Eligibility

✓ Be an Australian citizen or permanent resident

✓ Be 18 years or older OR 16 years old where the parent applies for the plan

✓ Be able to service the payment plan repayment amounts

✓ Repay the plan off in designated plan timeframe

✓ Single borrower only – no joint applications

# Document Checklist

✓ Driver's Licence or Passport

✓ Medicare Card

✓ Employment Details

✓ Bank Details

# Eligibility

Please confirm the following details in order to proceed with an application with ZeeFi Payment Assist.

| |
|---|
| Are you over 18 and an Australian Citizen, Permanent Resident or have full working entitlements within Australia? |
| You can comfortably afford your lifestyle costs, and are not in financial hardship or unmanageable credit debt; |
| You understand and accept a pay by instalment agreement, and is not regulated credit; |
| You understand and accept that a failure to pay could result in the default being reported to a credit agency. |

No

# Privacy & SMS Check

**ZeeFi**

## Privacy wording:

"ZeeFi Payment Assist is required to provide you with their Terms and Conditions, Privacy Policy, and Credit Reporting Information Statement. Please enter your mobile number below and you will receive an SMS with a verification code including a link to the policies. Please note that by inputting the verification code you acknowledge that you have reviewed and accept the Policies."

## SMS verification

Mobile number

> 04

**Send SMS**

> Your one time password from Payment Assist is fff7b8. Please go through the privacy policy link https://zeefi.io/legals/

## SMS verification

SMS code

**Resend SMS Code**     **Proceed**

# Student Information

ZeeFi

## Applicant Information

First name

Middle Name (Optional)

Last name

Gender

Male

Email

Confirm email

Mobile number

04   35631040

Date of birth

dd/mm/yyyy

Number of dependents

0

Relationship status

Single

## Alternate Contact

Note: This is a backup contact only to be used if we lose contact with you.

First name

Middle Name (Optional)

Last name

Relationship with Borrower

Employer

Phone Number type

Mobile

Mobile number

Continue

# Plan Details

**ZeeFi**

APPLICANT — **PLAN SUMMARY** — CONFIRMING ID & BANK ACCOUNT

Total Course Cost

$ 2,000

Plan Term

🕐 12 months ⌄

Repayment

📅 WEEKLY ⌄

**Back**   **Calculate**

# Confirming ID & Bank Account

**ZeeFi**

APPLICANT — PLAN SUMMARY — **CONFIRMING ID & BANK ACCOUNT**

## Address

Home address

🏠 Enter a location

☐ Manual address (optional)

How long have you lived here ?

🕐 < 6 months ⌄

Previous Home address

🏠 Enter a location

☐ Manual address (optional)

How long did you live in your previous address?

🕐 < 6 months ⌄

*Medicare*

Colour

🪪 Green ⌄

Number

🪪

Card position

🪪 1 ⌄

Valid to (mm/yyyy)

1 ⌄ / yyyy

# Confirming ID & Bank Account

**ZeeFi**

## *Identification*

Identification type

| 📇 Driver licence | ⌄ |

Driver licence number

| 🪪 |

State

| 📍 ACT | ⌄ |

Expire on

| dd/mm/yyyy |

## *Nominate your Direct Debit Account*

Bank name

| 🏛 |

Account holder name
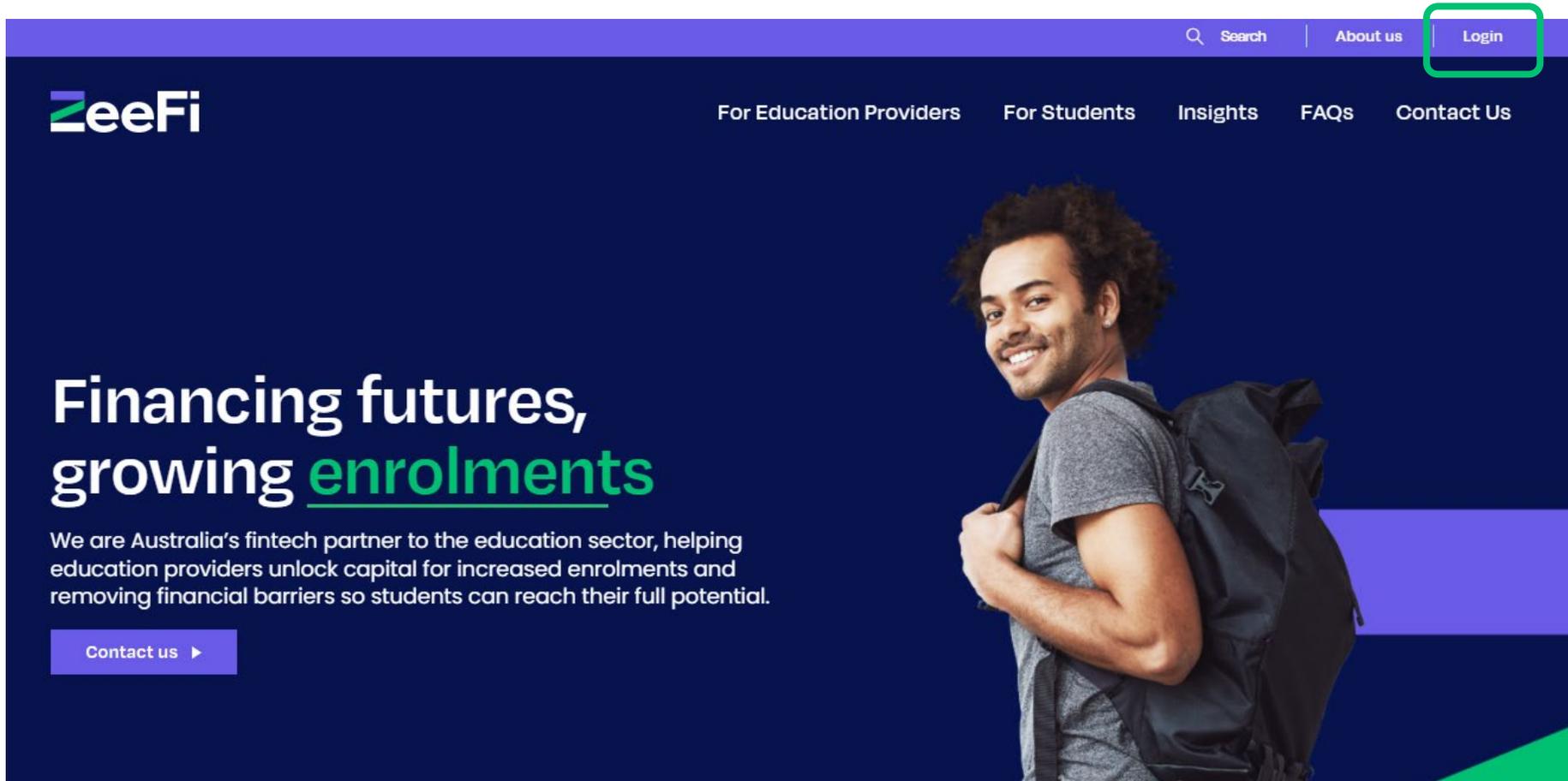
| 👤 |

Account number

| 🏛 |

BSB number

| 🏛 |

| Back | Continue |

# Partner Portal Guide

# Homepage Portal Location



Once you have created your password from our "Welcome to ZeeFi" email; log in from the homepage to access the **Education Provider** portal.

The homepage is:
**ZeeFi.io**

# How to Login



**ZeeFi**

## Login

👤 Username

🔒 Password

**Log in**

Forgot your password?

Your username will be the **email address** you have registered with ZeeFi.

Log in with your email address and your unique password. If you forget your password, click '**Forgot your password?**' at the bottom left. Enter your email address and you will be sent a password reset email.

# How to View Application



When you first sign in, you will see the '**Applications**' tab

Here you can **search** an application by name or number, and you can also filter the applications through the '**Filter by Status**' drop-down menu.

**Partial Application:**
Student has not fully completed the initial application process (incomplete).

**Pending Approval:**
ZeeFi is currently assessing the application.

**Approved:**
Student has been approved for funding with ZeeFi. The student will need to review and sign the payment plan agreement.

**Signed:**
Student has signed the payment plan agreement with ZeeFi. You can now request for funding. This is usually at the course commencing date.

**Rejected:**
ZeeFi is unable to provide financial support at this point in time.

# How to Start a Payment Plan

**ZeeFi**

## Applications

Filter by Status

| Signed | ▾ |
| --- | --- |

### APP-0000007340

Created on 24/08/2021

| Borrower Name | TestTwentyfour Test |
| --- | --- |
| Student Name | TestTwentyfour Test |
| Plan Amount | $4,000.00 |
| Status | Signed |
| Course Name | Diploma of Screen and Media (Study Pay) |

| Input First Payment Date | More Info |
| --- | --- |

### Please enter first payment date

| dd/mm/yyyy |
| --- |

| Cancel | Ok |
| --- | --- |

In order to activate a student's payment plan, make sure you filter by **Signed** students.

To differentiate between loan and payment plan applications, you can differentiate through the following:

- Plan Amount
- Course name with 'SP'
- The button on the bottom left will be 'Input First Payment Date' instead of 'Request Funds'.

Click the '**Input First Payment Date**' button and input the date - this date will be the date the first direct debit occurs for the payment plan.

Please allow 3 business days for the system to setup and activate the payment plan.

# Marketing Materials

ZeeFi

# Student Flyer



All marketing materials are available here:
www.zeefi.io/resources

# Maintaining a Successful Partnership

ZeeFi

# Successful Partnership Checklist

✓ ## Engage in regular meetings with ZeeFi
- Dedicate time for a one-hour onboarding training session, followed by;
- Ongoing fortnightly, monthly or bi-monthly catch ups

✓ ## Have a ZeeFi page on your website
- A dedicated information page about ZeeFi financing solutions for your prospective students. If you have a pricing or payment plan page, this is a great place.
- Assets like logo and copy required for webpage is available on the Partner Resources page

✓ ## Keeping information relevant
- This includes changes on course details, price, staff etc.
- Be sure to also share any updates on ZeeFi products to your entire team

✓ ## Regularly communicate the availability of ZeeFi financing solutions to your prospective students
- Email campaigns – when emailing prospects leading up to intakes, include information about ZeeFi to further convert leads and attach the student flyer available on the Partner Resources page

✓ ## Understand how to use the Partner Portal
- This helps you stay on top of monitoring student applications and loans and requesting for funds

# Thank you

ZeeFi

✉ Support@ZeeFi.io

☎ 1800 324 909