

AUTOMATED CREDIT TRANSFER PROCESS

Please follow these instructions to apply for Credit Transfer for any units of competency in your enrolled qualification course.

Step 1 – In your Members Area, select the **Learning Centre** icon in the yellow menu strip on the left hand side. This will open to the **Course Content & Assessments Dashboard** where you will find your course. Click on the **View Course Content** icon.

Select Language ▾

Logout

Course Content And Assessments Dashboard

Print

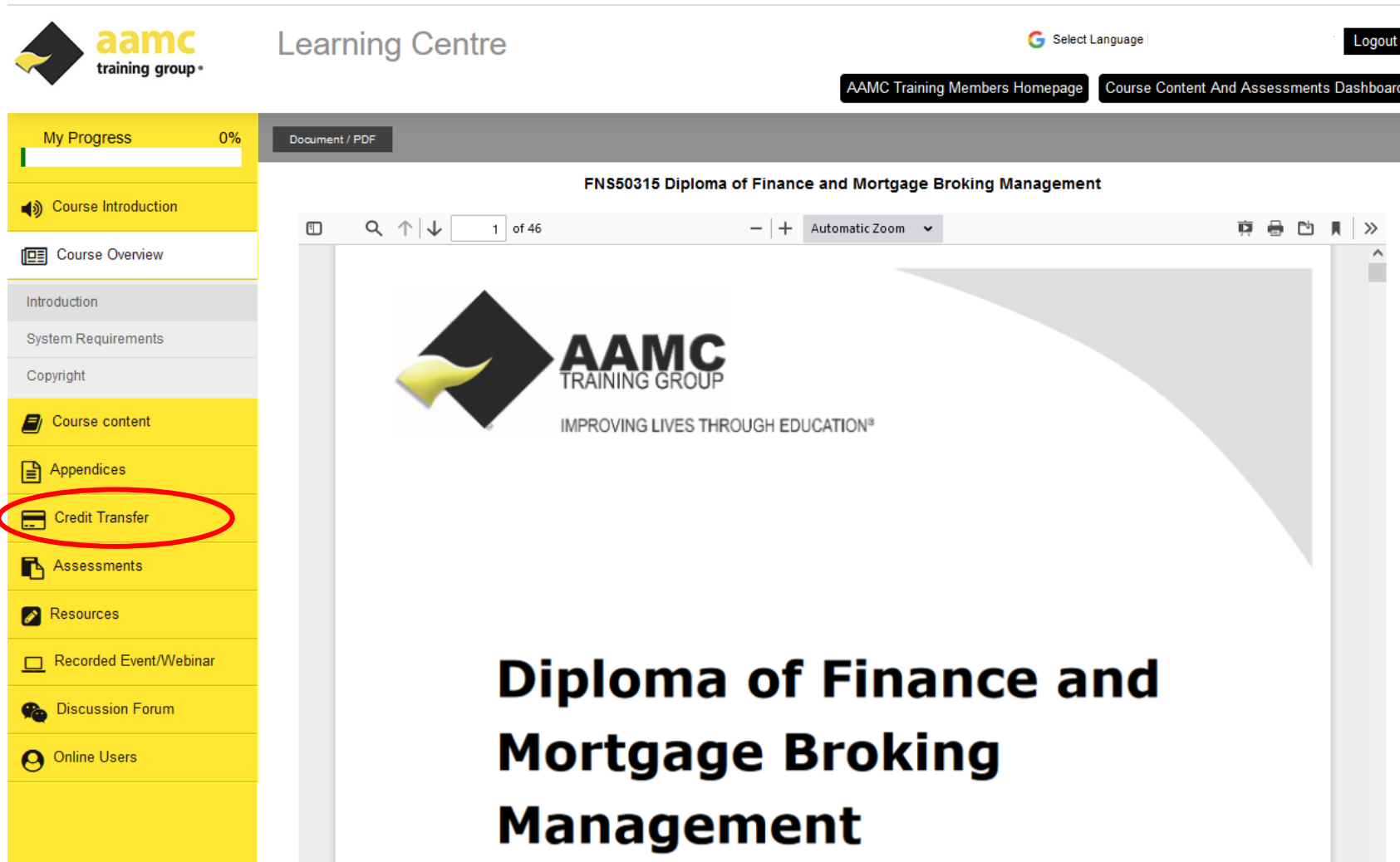
Course Enrolment Year

CERTIFICATE COURSES

Course Start Date	Course Expiry Date	Course Name	Version / Stream	View Course Content	View Assessments	Hours	Accrued Points	Certification Date	Renew Course	View Assessment Progress
30/01/2020	30/01/2021	FN550615 Diploma of Financial Planning				15.00	0			
12/02/2020	12/02/2021	Advice in Life Insurance - Tier 1				3.00	0			
06/05/2020	06/05/2021	Dual Certification in Training and Assessment (ITAC4 & KKNi Methodology Level IV)-(Indonesian Course)	Virtual			15.00	0			
21/08/2020	21/08/2021	FNSFLT301 Be MoneySmart				3.00	0			
17/05/2021	17/05/2022	Tier 2 ASIC Advice in General Insurance RG146				8.00	8.00	03/06/2021		
27/05/2021	27/05/2022	FN550315 Diploma of Finance and Mortgage Broking Management	ACC/FP STREAM			30.00	0			
							74.00	8.00		

[View All Certificate Course Assessment List](#)

Step 2 – You will be directed to a page entitled **Learning Centre**. Select the  Credit Transfer tab from the menu on the left.




The screenshot shows the AAMC Learning Centre interface. At the top left is the AAMC logo. The page title is "Learning Centre". On the right, there are links for "Select Language" and "Logout". Below these are two buttons: "AAMC Training Members Homepage" and "Course Content And Assessments Dashboard".

The left-hand navigation menu includes the following items:


- My Progress 0%
- Course Introduction
- Course Overview
- Introduction
- System Requirements
- Copyright
- Course content
- Appendices
- Credit Transfer** (circled in red)
- Assessments
- Resources
- Recorded Event/Webinar
- Discussion Forum
- Online Users


The main content area displays the course title "FNS50315 Diploma of Finance and Mortgage Broking Management". Below the title is the AAMC logo and the text "AAMC TRAINING GROUP" and "IMPROVING LIVES THROUGH EDUCATION®". The main heading is "Diploma of Finance and Mortgage Broking Management".


Step 3 – Read the Add Credit Transfer Details explanation and instructions on how to proceed and which documents are required to qualify for Credit Transfer.


My Progress 0%



ADD CREDIT TRANSFER DETAILS


 Course Introduction


 Course Overview


 Course content


 Appendices


 Credit Transfer

 Assessments

 Resources

 Recorded Event/Webinar

 Discussion Forum

 Online Users

Credit Transfer

You may be able to claim credit transfer for a unit/s of competency that you may have previously completed with AAMC Training or another RTO. If you have been awarded a record of result or statement of attainment for any of the units detailed below then please check mark the unit/s you have previously completed and upload a *certified copy of your record of results or statement of attainment. Your credit transfer request will then be reviewed and you will be notified by email if your request has been approved.

*Copies of documents provided in support of an application, or other purpose required by the National Law, must be certified as true copies of the original documents. For a list of persons who can certify documents: <http://www.ahpra.gov.au/Registration/Registration-Process/Certifying-Documents.aspx>

Certified documents must:

- Be initialled on every page by the Authorised Officer.
- Annotated on the last page as appropriate e.g. "I have sighted the original document and certify this to be a true copy of the original" and signed by the Authorised Officer.
- List the name, date of certification, and contact phone number and position number (if relevant) and have the stamp or seal of the Authorised Officer (if relevant) applied.
- If your record of results or statement of attainment was obtained through AAMC Training, an uncertified copy will be sufficient as AAMC Training can confirm the authenticity of your unit/s of competency.

Please refer to AAMC Training's full Recognition Policy for further details.

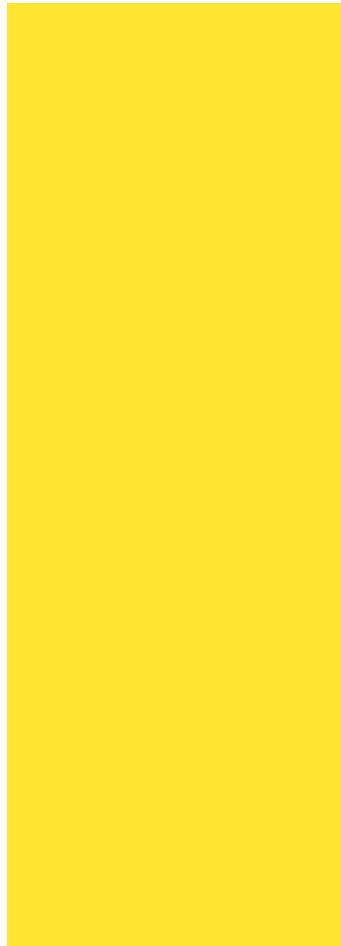
Course Name FNS50315 Diploma of Finance and Mortgage Broking Management

Select Units

Unit Code	Unit Name	Credit Transfer Request	Status
FNSFMK505	Comply with financial services legislation and industry codes of practice	<input type="checkbox"/>	
FNSFMB401	Prepare loan application on behalf of finance or mortgage broking clients	<input type="checkbox"/>	
FNSFMB402	Identify client needs for broking services	<input type="checkbox"/>	
FNSFMB403	Present broking options to client	<input type="checkbox"/>	

Step 4 – Scroll down the page, clicking the checkboxes of the units already attained.

If the units you are requesting Credit Transfer were done with an RTO other than AAMC Training, complete the information requested under **Select RTO**. Upload your evidence documentation of the corresponding units (as specified in the details). When complete, select **'Submit Credit Transfer Request'**.



FNSINC402	Develop and maintain in-depth knowledge of products and services used by an organisation or sector	<input type="checkbox"/>	
FNSFMB501	Settle applications and loan arrangements in the finance and mortgage broking industry	<input type="checkbox"/>	
FNSCUS501	Develop and nurture relationships with clients, other professionals and third party referrers	<input type="checkbox"/>	
BSBWOR501	Manage personal work priorities and professional development	<input type="checkbox"/>	
BSBRSK401	Identify risk and apply risk management processes	<input type="checkbox"/>	
FNSFMB502	Identify and develop broking options for clients with complex needs	<input type="checkbox"/>	
FNSFMB503	Present broking options to client with complex needs	<input type="checkbox"/>	
FNSFMB504	Implement complex loan structures	<input type="checkbox"/>	
FNSRSK502	Assess risks	<input type="checkbox"/>	
FNSPRM603	Grow the practice	<input type="checkbox"/>	

Select RTO

AAMC Training ▾

Upload Proof 1

No file selected.

Upload Proof 2

No file selected.

Upload Proof 3

No file selected.

Step 5 – The request will show as ‘**Credit Transfer Request Pending**’ in the table and will be sent to AAMC Training admin to review your evidence documentation and approve. Once approved, the corresponding assessment/s will be marked as **Credit Transfer** and will not be required to be completed (unless the unit is part of a clustered assessment and the student requires the other units within the cluster – in which case the full assessment is required to be completed).

Credit Trans Id	Course Name	Date	Status	View File 1	View File 2	View File 3	Additional File
22	FNS40815 - Certificate IV in Finance and Mortgage Broking	29/01/2016	Credit Transfer Request Pending	943_19015_CRICOS Wbinar_Aug2014.pdf			Upload Additional Document

Course Name FNS40815 - Certificate IV in Finance and Mortgage Broking

Select Units

Unit Code	Unit Name	Credit Transfer Request	Status
FNSFMK505	Comply with financial services legislation and industry codes of practice	<input checked="" type="checkbox"/>	Credit Transfer Request Pending
FNSFMB401	Prepare loan application on behalf of finance or mortgage broking clients	<input type="checkbox"/>	
FNSINC401	Apply principles of professional practice to work in the financial services industry	<input checked="" type="checkbox"/>	Credit Transfer Request Pending
FNSCRD301	Process applications for credit	<input checked="" type="checkbox"/>	Credit Transfer Request Pending
FNSFMB402	Identify client needs for broking services	<input type="checkbox"/>	
FNSFMB403	Present broking options to client	<input type="checkbox"/>	
FNSFMB501	Settle applications and loan arrangements in the finance and mortgage broking industry	<input type="checkbox"/>	
FNSINC402	Develop and maintain in-depth knowledge of products and services used by an organisation or sector	<input type="checkbox"/>	

Step 6 – Once the request has been reviewed by AAMC Training Admin, email confirmation will be sent out to the student to advise them of the outcome. This can take up to 48 hours.