



Student  
Loans Company

STUDENT INFORMATION SERVICE

ATTENDANCE AND FEES PROCESSING

## Attendance and Fees Implementation AY 12/13

- Full Time Students
  - Overview and Background
  - Attendance Confirmations
  - Registration Confirmations
  - Combined Confirmations
- Part Time Students
  - Overview and Background
  - Process Design



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FULL TIME STUDENTS

# Overview and Background

<b>Summary of change</b>	<b>Provide payments of tuition fee loans / grant to HEIs in 3 instalments, the first at the beginning of the AY. The single point of liability (currently reached after 3 months) will be replaced by 3 points of liability.</b>
<b>Reason for change</b>	BIS, DfES and DEL wish to improve cash flow to HEIs throughout the year whilst ensuring HEIs are incentivised to retain students.
<b>When</b>	From AY 12/13 onward
<b>Who does the change apply to?</b>	New and continuing full time English, Welsh, NI and EU students. New part time English students studying at any UK HEI and part time European students studying at an English HEI
<b>High Level Process Design</b>	HEIs will confirm attendance for the purposes of fee loans and grants using the existing Student Information System at 3 points during the AY. Each confirmation will trigger payment of a portion of the fee loan / grant
	Registration confirmations will move from the ELP site to the Student Information Service
	Separate Attendance and Registration worklists will remain but a solution will also be provided for HEIs to confirm Registration and Attendance for the 1 <sup>st</sup> instalment of the fee loan / grant at the same time through a combined worklist

## Attendance Confirmations – Tuition Fee Payments

- Students will appear on the Attendance Worklist at 3 separate points in the AY
  - Liability dates will correspond to HEI Term Dates
- HEIs will be paid in 3 instalments – 25% ,25%, 50%
  - for Autumn starts this will be 3<sup>rd</sup> wk in Oct ,1<sup>st</sup> wk in Feb and 1<sup>st</sup> wk in May
  - HEIs only entitled to receive the full fee loan / grant if the student is in attendance at each of these liability dates
- Student liability for the fee loan extends at each liability date – becoming liable for the full amount if in attendance at the last liability date
  - Interest starts to accrue when payment of the loan is made to the HEI

## Tuition Fee Payment Dates

- Payment of Tuition Fees will then be made to HEIs in 3 instalments
  - 25%, 25%, 50%
  - set dates for each AY start

Season (Academic Year Start)	Payment 1	%	Payment 2	%	Payment 3	%
<b>AUT (Sep - Dec)</b>	3rd Wed Oct	25%	1st Wed Feb	25%	1st Wed May	50%
<b>WIN (Jan - Mar)</b>	1st Wed Feb	25%	1st Wed May	25%	3rd Wed Oct	50%
<b>SPR (Apr - Jun)</b>	1st Wed May	25%	3rd Wed Oct	25%	1st Wed Feb	50%
<b>SUM (Jul - Aug)</b>	3rd Wed July	25%	3rd Wed Nov	25%	3rd Wed March	50%

## Attendance Confirmations - Reporting

- First attendance confirmation:
  - Students who require an attendance confirmation will appear on the worklist under existing business rules
- Second and third attendance confirmations:
  - Students will appear:
    - under existing business rules
    - if they have not subsequently withdrawn or transferred out since the previous attendance confirmation
    - if a previous attendance confirmation is required but has not been received – confirmations will be required for all outstanding periods
- If more than one confirmation is required, the latest confirmation cannot be made before we receive all previous confirmations

# Attendance Confirmations

- SIS Home
- CoC
- Attendance Worklist
- Bulk Upload View
- Reports
- Student Information
- HE Gateway Home

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Attendance Worklist

Help

Filter

Student Details

Academic Year:

Customer Reference Number:

Forename(s) Use wildcards to find more matches, e.g. %Joh%:

Date Of Birth (dd/mm/yyyy):

Number of records to display per page:

Course Details

Application Type:  P/T  F/T  All

SSN:

Surname Use wildcards to find more matches, e.g. %Joh%:

UCAS Application Number:

Clear Filter and Results

Export Results

Outstanding Attendance Confirmations

Unconfirmed (30)

SSN	Full Name	DoB	Course Name	Year	SLC Code	Fee Rate	Loan Requested	Loan Approved	Loan Payable	Att Code 1	Att Code 2	Att Code 3	Type
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	P110	£1,034	£3,221	£3,435	£824.24	A	<input type="text" value="v"/>	<input type="text" value="v"/>	FT
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	P110	£1,034	£3,221	£3,435	£824.24	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	FT
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	P110	£1,034	£3,221	£3,435	£824.24	X	<input type="text" value="v"/>	<input type="text" value="v"/>	PT
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	P110	£1,034	£3,221	£3,435	£824.24	<input type="text" value="v"/>			PT
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	P110	£1,034	£3,221	£3,435	£824.24	<input type="text" value="v"/>	<input type="text" value="v"/>	<input type="text" value="v"/>	FT

**YOU MUST ENSURE THAT THE ATTENDANCE CODES YOU SUBMIT ARE ACCURATE**

5,566 records found  
Displaying page 1 of 223

1

2

3

4

5

6

7

8

9

10

## Attendance Confirmations

- Attendance worklist export:
  - Will remain in the current format and layout
  - HEIs should aim to clear outstanding confirmations before the next liability period
    - Process where this has not been done
- CoC:
  - Will remain largely as is (no change to import for full time)
  - System developments planned to automate processing where possible
  - If a CoC is submitted which affects the previous liability period, re-confirmation for that period will be required
- Financial Reports:
  - Will remain largely as is with the introduction of a new forecast report

## Payment Dates

- Payment of Tuition Fees will then be made to HEIs in 3 instalments
  - 25%, 25%, 50%
  - set dates for each AY start

Season (Academic Year Start)	Payment 1	%	Payment 2	%	Payment 3	%
<b>AUT (Sep - Dec)</b>	3rd Wed Oct	25%	1st Wed Feb	25%	1st Wed May	50%
<b>WIN (Jan - Mar)</b>	1st Wed Feb	25%	1st Wed May	25%	3rd Wed Oct	50%
<b>SPR (Apr - Jun)</b>	1st Wed May	25%	3rd Wed Oct	25%	1st Wed Feb	50%
<b>SUM (Jul - Aug)</b>	3rd Wed July	25%	3rd Wed Nov	25%	3rd Wed March	50%

## Maximising Fee Payments – what are the issues?

- Student Applications
  - Missing identity evidence
  - Non return of declaration
- Student transfers in, in term 1
- Invalid or missing National Insurance numbers
- Temporary courses
- Course/fee mismatches exist when confirming attendance
- Non timely submissions of attendance confirmations prior to payment dates



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QUESTION TIME

## Registration

- Student registrations will be confirmed using Student Information Service (full time students only)
- Students will appear on a worklist when SLC require a registration confirmation
- Similar functionality and filters as attendance worklist
- Can confirm registrations via the worklist or by importing a file in the current SSAC format

## Registration

- Confirmation message will show that registration confirmations have been successfully submitted
- File import process will be the same as the current attendance process
  - Initial file validation
  - Processed offline
  - Can view file details once processed

## Registration

- The following registration status will show against each student:
  - Not registered
  - Registered
  - Awaiting registration confirmation
  - Registration not required
- Retain the ability to send in confirmations for students who are not yet showing for your HEI (current “manual SSAC” process) – AY and SSN required
- Registration status will show on detailed student information screen and will be added to the student history
- Ability to submit “No” as a registration confirmation through the screens but not the file import

# Registration

#headerImageAltText

Logout |

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- SIS Home
- CoC
- Registration Home
- Registration Worklist
- Import Registration Confirmations
- Registration Import Results
- Student Information**
- HE Gateway Home

## Registration Worklist

**Filter** Help

Student Details	Course Details		
Academic Year	09-10	Customer Reference Number	
SSN		Surname	
Forename(s) <small>Use wildcards to find more matches, e.g. %Joh%</small>		UCAS Application Number	
Date Of Birth (dd/mm/yyyy)			
Number of records to display per page	25		

Clear Filter and Results

Export Results

### Outstanding Registration Confirmations

Unconfirmed (30)

SSN	Full Name†	DoB	Course Name	Year	Fee	Registration Confirmation
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	£6,000	✔ Yes
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	£6,000	<input type="radio"/> Yes <input checked="" type="radio"/> No
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	£6,000	<input type="radio"/> Yes <input checked="" type="radio"/> No
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	£6,000	<input type="radio"/> Yes <input checked="" type="radio"/> No
HAMP00000000A	Brian Jones	10/10/1989	Physics	2	£6,000	<input type="radio"/> Yes <input checked="" type="radio"/> No

YOU MUST ENSURE THAT THE ATTENDANCE CODES YOU SUBMIT ARE ACCURATE

Submit

5,566 records found  
Displaying page 1 of 223

1 2 3 4 5 6 7 8 9 10 Next Last



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## Combined Confirmations

- Provide a new worklist for HEIs to confirm both registration and the **first attendance confirmation only** at the same time
- Export and import would mirror current SSAR and SSAC file
- Confirmation of registration made through the combined worklist will release maintenance and the first instalment of the tuition fee loan / grant – marking those students as an “A” for fee purposes
- HEIs will be expected to then submit any CoCs to correct students on incorrect courses / fees etc before the second liability date

## Combined Confirmations

- HEIs have option to either use the combined worklist or use the separate registration and attendance worklists
- If a confirmation is made via the combined, it will remove the entry from the registration and attendance worklist
- If either a registration or attendance confirmations is made through the separate worklists, it will remove it from the combined worklist

## Required changes to Bursary System

- Attendance triggers for payments:
  - SSAC will become **Registration**
  - ACR will become **Attendance**
  - Addition of **Attendance 1, Attendance 2 and Attendance 3** to allow HEIs to only pay bursaries if students are in attendance at each of the liability dates
- Pended payment reasons on student payment screen:
  - Updated to reflect the above
- Pended payment reasons on pended payment report:
  - Updated to reflect the above



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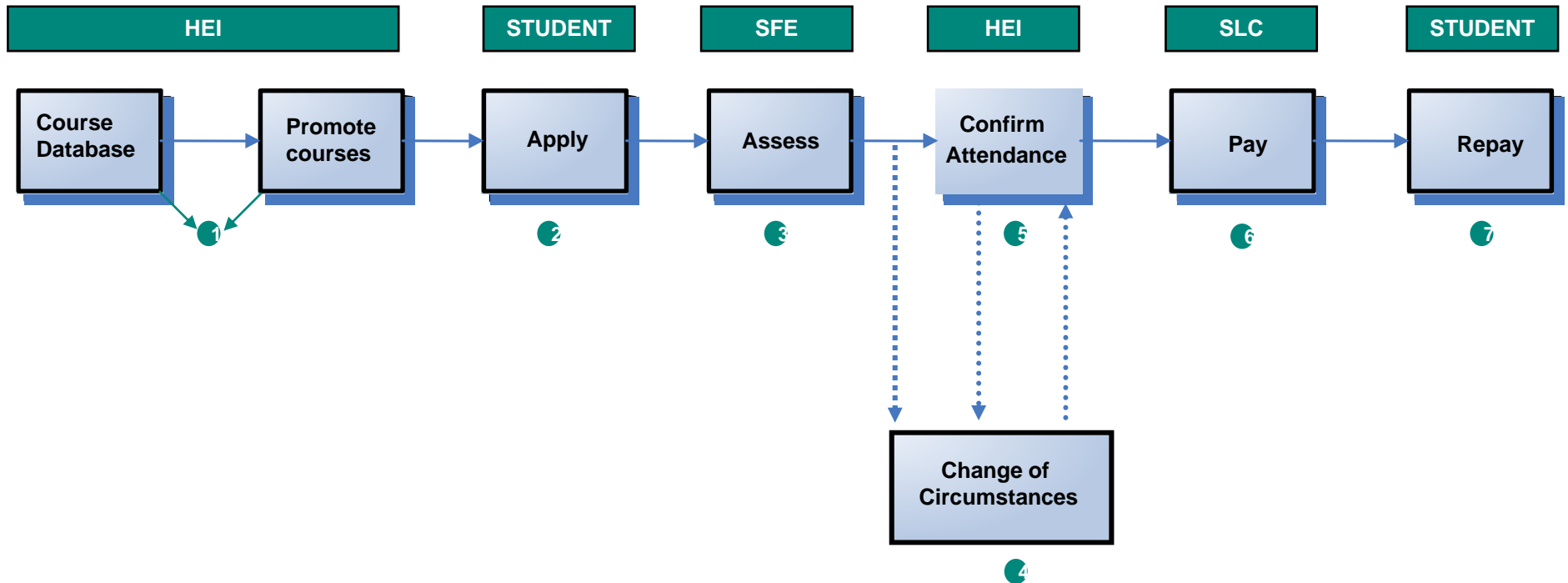
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PART TIME STUDENTS

# Overview and Background

<b>Summary of change</b>	<b>Provision of non-means tested tuition fee loans for part-time higher education courses</b>
<b>Reason for change</b>	The government wishes to introduce parity between full-time and part-time students by removing the need for part-time students to pay tuition fees upfront
<b>When</b>	Students starting part-time courses from 1 <sup>st</sup> September in academic year 12/13 (existing students will continue with old scheme and will not apply for loans)
<b>Who is eligible?</b>	English students studying at any UK HEI European students studying at an English HEI (Non-English UK students studying at English HEIs will apply to their own authority for support)
<b>Eligibility rules</b>	Student must study at an intensity of at least 25% (and not dip below this in any one year)
	Tuition fee loans will be provided for a maximum of 16 years (four year degree course studied at 25% intensity)
<b>Policy</b>	There will no longer be any fee grant or course grants available to new students from 1 <sup>st</sup> Sept 2012 onwards  The package of support will NOT change for continuing students ( ie grants but no TFL)  Disabled Student Allowance will remain as is

# Overview of Part-Time Process (new students only)



# 1.Course Database

- Update Institution Profile
  - New PT Cap : £6750 with access agreement or £4500 without
  - Enter predicted number of PT courses
- Provide Course Details:
  - Name of Course
  - Fee (either maximum or most common)
  - Duration (Full Time Equivalent)
  - Qualification
  - Current Year Start Date for the course (optional)

# 1.Course Database

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## Create Course

Full Time **Part Time**

Create Part Time Course		Help	
Academic Year	12-13	Full Time Equivalent Duration	Please Select years
Campus ID	A	Qualification	Please Select
Course Name		Course Fee Rate (HEI Fee Rate Cap £6750)	
Method of Attendance	Part Time Attendance	Current Year Start Date (MM/YYYY)	
Course Type	Part Time	Course Status	Open
HEI Course Code			

Save Validate Promote

## 2.Apply

- Paper applications will be available from July onwards
- Downloadable from Direct Gov website
- Student discussions with HEI to agree
  - course / modules
  - Tuition Fee
  - Current Year Start Date
- Student submits application to SFE

**FUTURE ENHANCEMENT:** Working towards an online application process to be introduced later in AY12/13

## 3.Assess

- SFE assess eligibility and approve Tuition Fee Loan application
- Student receives letter stating loan available
- Student details passed through to Student Information Service (SIS)
- Note: When the application is online, the declaration will be included in the entitlement letter the student receives which must be signed and returned

## 4. Change of Circumstances

- Ability to filter on part time in View CoC
- All categories available for full time will also be available for part time
- Bulk upload facility will also be available
  - Can submit full time and part time on the same file
  - Except those
    - where the reason is <25%,>25%,
    - Current Year Start Date
    - non designated course

## 4. Change of Circumstances

### Prior to Attendance Confirmation *(if possible)*

- HEIs can go into “View Student Information” to check student details provided and raise CoC
- Amend Current Year Start Date (month and year only) via ‘Transfer’ CoC category
  - NB: date cannot be prior to 1<sup>st</sup> Sept 2012
- Additional changes planned for Fee CoCs where:
  - the study intensity drops below or goes above 25%
  - student changing to a course which is not designated for support
  - HEIs will be required to select appropriate reason
  - Will not be automatically re-assessed as per other fee changes

## 5. Confirm Attendance

- HEI required to confirm student details and attendance code via the 'attendance worklist' or import/export facility on SIS
  - Course
  - Current Year Start Date
  - Tuition Fee
- Students will appear on the worklist from the 1<sup>st</sup> of the month of the Current Year Start Date (e.g. Oct 2012 will appear at 1<sup>st</sup> Oct 2012)
- Two Week Rule: Confirmation can only be returned after student has been in attendance for two weeks
- Only one attendance confirmation will be required for part time students

## 6.Pay

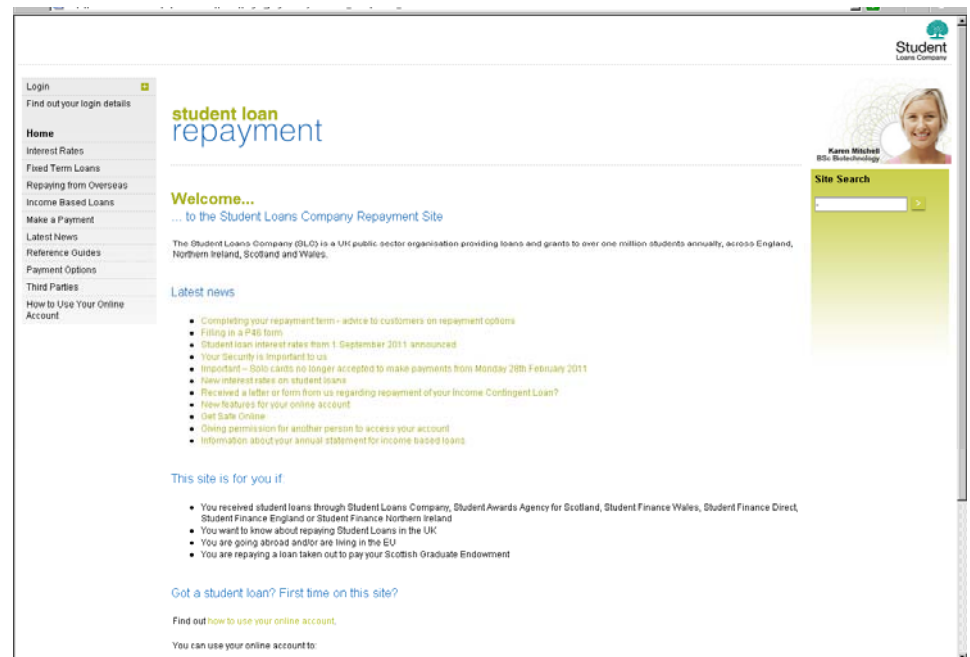
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  - 25%, 25%, 50%
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<b>SUM (Jul - Aug)</b>	3rd Wed July	25%	3rd Wed Nov	25%	3rd Wed March	50%

- SLC will make all 3 payments unless notified of a withdrawal, suspension, transfer, or drop below 25% intensity

## 7. Repayment

- No student will have to start repayments until after April 2016 regardless of when they finish or leave their course
- Repayment begins **four** years from the April after course commencement
- For full details refer to the Repayments website:  
[www.studentloanrepayment.co.uk](http://www.studentloanrepayment.co.uk)



The screenshot shows the homepage of the Student Loan Repayment website. The page features a navigation menu on the left with options like 'Login', 'Home', 'Interest Rates', 'Fixed Term Loans', 'Repaying from Overseas', 'Income Based Loans', 'Make a Payment', 'Latest News', 'Reference Guides', 'Payment Options', 'Third Parties', and 'How to Use Your Online Account'. The main content area includes a 'Welcome...' message, a 'Latest news' section with several bullet points, and a 'This site is for you if' section with a list of user scenarios. A search bar is visible on the right side of the page.

student loan repayment

Welcome...  
... to the Student Loans Company Repayment Site

The Student Loans Company (SLO) is a UK public sector organisation providing loans and grants to over one million students annually, across England, Northern Ireland, Scotland and Wales.

Latest news

- Completing your repayment form - advice to customers on repayment options
- Filling in a P45 form
- Student loan interest rates from 1 September 2011 announced
- Your Security is Important to us
- Important - Solo cards no longer accepted to make payments from Monday 28th February 2011
- New interest rates on student loans
- Received a letter or form from us regarding repayment of your Income Contingent Loan?
- New features for your online account
- Get Safe Online
- Giving permission for another person to access your account
- Information about your annual statement for income based loans

This site is for you if

- You received student loans through Student Loans Company, Student Awards Agency for Scotland, Student Finance Wales, Student Finance Direct, Student Finance England or Student Finance Northern Ireland
- You want to know about repaying Student Loans in the UK
- You are going abroad and/or are living in the EU
- You are repaying a loan taken out to pay your Scottish Graduate Endowment

Got a student loan? First time on this site?

Find out how to use your online account.

You can use your online account to:



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## SIS REASSESSMENT SCENARIOS

# Fee Changes

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	<p>Course Fee £6000</p> <p><b>25% = £1500</b></p>		
	<p>Fee change to £9000</p> <p><b>+ £750</b></p> <p><i>(25% = £2250 - £1500 already paid)</i></p>		
2 <sup>nd</sup> Liability Period		<p><b>25% = £2250</b></p>	
3 <sup>rd</sup> Liability Period			<p><b>50% = £4500</b></p>

# Fee Waivers (1)

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Course Fee £9000 <b>25% = £2250</b>	Fee waiver of £1000  CoC: Course Fee £8000 & Student Liability £8000  <b>£1750</b>  <i>(25% @ £2000 - £250 adjustment for 1<sup>st</sup> Liability Period)</i>	       <b>50% = £4000</b>
2 <sup>nd</sup> Liability Period			
3 <sup>rd</sup> Liability Period			

## Fee Waivers (2)

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Course Fee £9000		
2 <sup>nd</sup> Liability Period			
3 <sup>rd</sup> Liability Period			
	<b>25% = £2250</b>	<b>25% = £2250</b>	<b>50% = £4500</b>
			Fee waiver of £1000
			CoC: Course Fee £8000 & Student Liability £8000
			<b>- (£1000)</b>

# Fee Waivers (3)

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	<p>Course Fee £9000</p> <p><b>25% = £2250</b></p>	<p>Fee waiver of £5500</p> <p>CoC: Course Fee £3500 &amp; Student Liability £3500</p> <p><b>£Nil</b></p> <p><i>(25% @ £3500 = £875 - £1375 overpayment for 1<sup>st</sup> Liability Period = -£500 however system will not clawback so 3<sup>rd</sup> Liability Period will be adjusted)</i></p>	<p>50% of £3500 = £1750 - £500 clawback from Liab Period 2</p> <p><b>£1250</b></p>
2 <sup>nd</sup> Liability Period			
3 <sup>rd</sup> Liability Period			

# Withdrawals

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Course Fee £9000  Student withdraws  CoC : Course Fee £2250 & Student Liability £2250		
2 <sup>nd</sup> Liability Period			
3 <sup>rd</sup> Liability Period			
	<b>25% = £2250</b>	<b>£Nil</b>	<b>£Nil</b>

# Suspensions and Resumptions

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Course Fee £9000 Student suspends	HEI returns an 'S' code on Attendance Confirmation as student still suspended	Student resumes study on or during 3 <sup>rd</sup> Liability period
	25% = £2250	£Nil	50% = £4500

# External Transfers Out (1)

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment		
1 <sup>st</sup> Liability Period	<p>Course Fee £9000</p> <p><b>25% = £2250</b></p> <p>Student transfers out HEI wishes to reduce fee to £2000</p> <p>CoC: Course Fee £2000 &amp; Student Liability £2000</p> <p><b>-(£250) clawback</b></p>	2 <sup>nd</sup> Liability Period	3 <sup>rd</sup> Liability Period	<p><b>£Nil</b></p>	<p><b>£Nil</b></p>

NB: HEI does not have to reduce fee and is entitled to keep full £2250

## External Transfers Out (2)

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Course Fee £9000	Student transfers out CoC : Course Fee £4500 & Student Liability £4500	
2 <sup>nd</sup> Liability Period			
3 <sup>rd</sup> Liability Period			
	25% = £2250	25% = £2250	£Nil

# External Transfers In (1)

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Student not in attendance	Student transfers in to HEI, Course Fee £9000 @75% = £6750	
		CoC: Course Fee £6750 & Student Liability £6750	
	<b>£Nil</b>	<b>33% = £2228</b>	<b>67% = £4522</b>
		3 <sup>rd</sup> Liability Period	

NB: Clash of Liability dates – only one Attendance Confirmation accepted & taken from HEI 1

## External Transfers In (2)

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Student not in attendance	Student not in attendance	Student transfers in to HEI Course Fee £9000 @ 50% = £4500
2 <sup>nd</sup> Liability Period			CoC: Course Fee £4500 & Student Liability £4500
3 <sup>rd</sup> Liability Period			
	£Nil	£Nil	100% = £4500

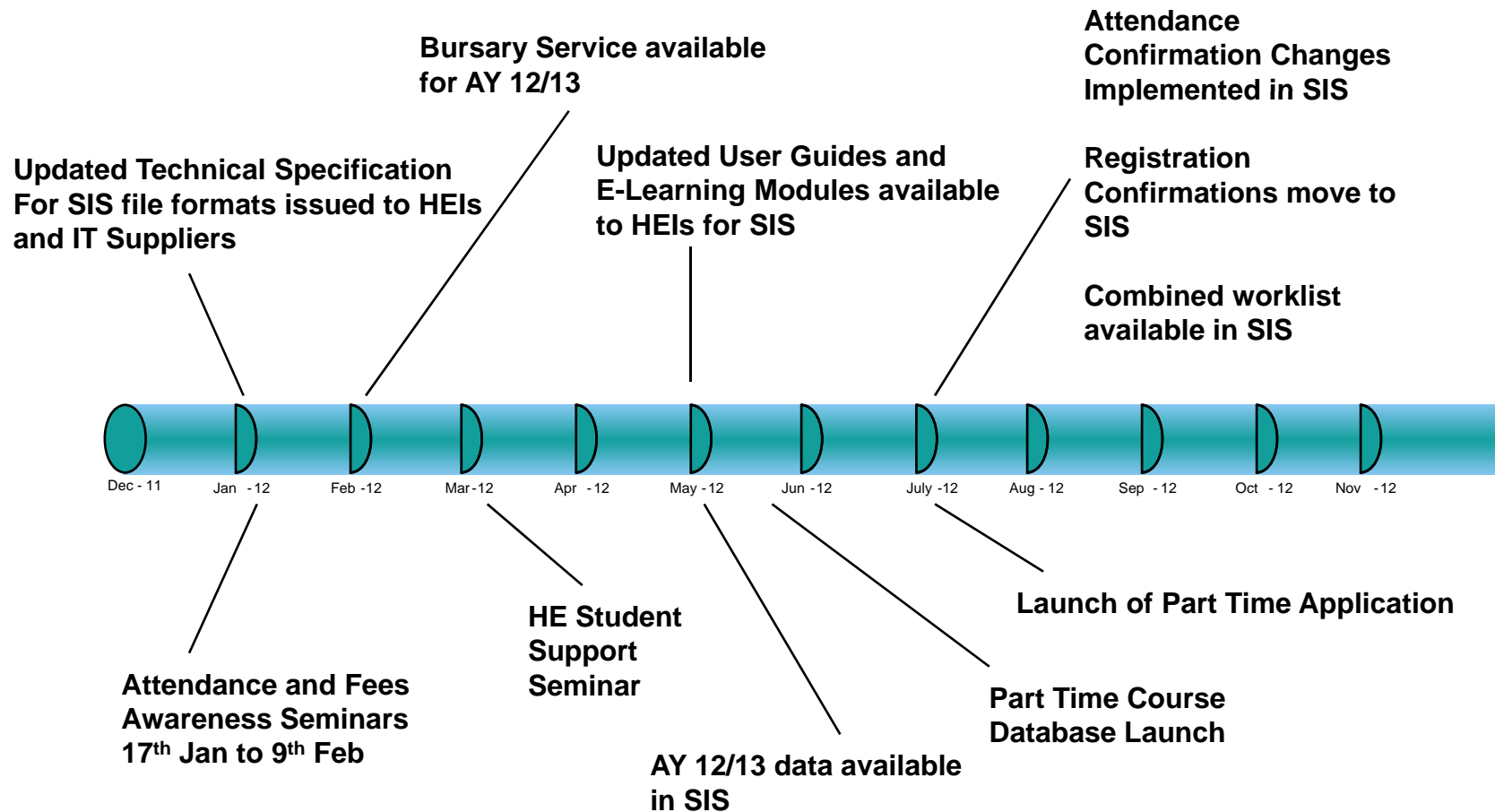
# Internal Course Transfers (1) – All fees new course

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	<p>Course A Fee £6000 Course A</p> <p><b>25% = £1500</b></p>	<p>Student transfers to Course B @ £9000</p> <p>75% of £9000 = £6750</p> <p>CoC: Course Fee £6750 &amp; Student Liability £6750</p> <p><b>33% = £2228</b></p>	<p>SIS will show one line of data recording Total Tuition Fee Loan for AY = £8250</p> <p><b>67% = £4522</b></p>
2 <sup>nd</sup> Liability Period			
3 <sup>rd</sup> Liability Period			

# Internal Course Transfers (2) – Split Fees

	1 <sup>st</sup> Payment	2 <sup>nd</sup> Payment	3 <sup>rd</sup> Payment
1 <sup>st</sup> Liability Period	Course Fee £6000	Student transfers to Course B @ £9000	
2 <sup>nd</sup> Liability Period		Fee due for 2 <sup>nd</sup> & 3 <sup>rd</sup> liability period @75% = £6750	
3 <sup>rd</sup> Liability Period		CoC: Course Fee £6750 & Student Liability £6750	
	<b>25% = £1500</b>	<b>33% = £2228</b>	<b>67% = £4522</b>

# AY 12/13 Key Business Events Timetable



## Next Steps and Actions

- Now - Distribute Technical Specification within your institution if appropriate
- February onwards – Set up Bursary awards for AY 12/13
- May – Distribute User Guides and E-Learning modules for completion to appropriate colleagues within your institution
- May onwards – Check student details in SIS – best practice is to submit CoCs where required prior to first attendance confirmation
- End May – Complete part time course submission prior to launch of part time application
- July onwards – Perform registration and attendance confirmations using the new process



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