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HE PORTAL

HEI SERVICES

9 - 10 March 2011

Agenda

- How to access the HE Portal
- Bursaries Service
- Courses Service
- Financial Information Service
- Student Information Service
- Further Information
- Questions



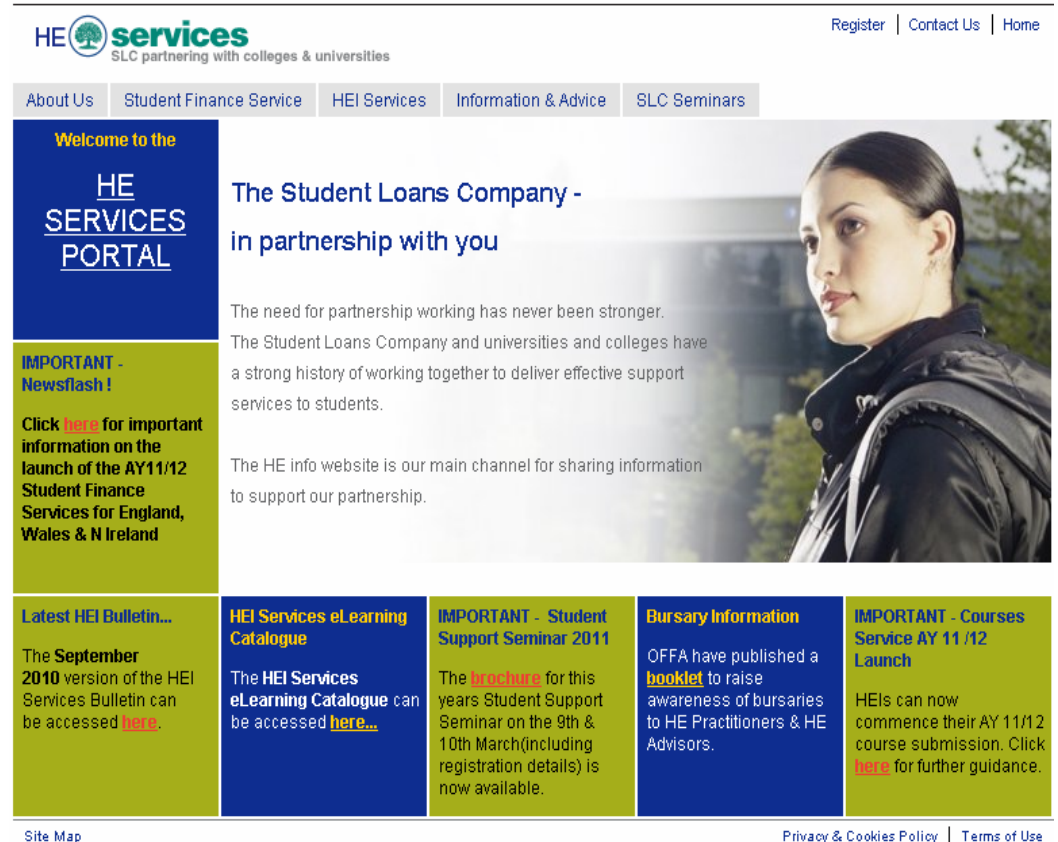
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HOW TO ACCESS THE HE PORTAL

HE Services website

www.heinfo.slc.co.uk

- About Us
- Student Finance Service
- HEI Services
- Information and Advice
- SLC Seminars



The screenshot shows the homepage of the HE Services website. At the top left is the logo for HE services, with the tagline "SLC partnering with colleges & universities". To the right of the logo are links for "Register", "Contact Us", and "Home". Below the logo is a navigation menu with tabs for "About Us", "Student Finance Service", "HEI Services", "Information & Advice", and "SLC Seminars". The main content area features a large blue box on the left with the text "Welcome to the HE SERVICES PORTAL". To the right of this box is a large image of a young woman in a black jacket, looking off to the side. Below the blue box is a green box with the text "IMPORTANT - Newsflash!" and a link to "Click here for important information on the launch of the AY11/12 Student Finance Services for England, Wales & N Ireland". Below the green box is a blue box with the text "The Student Loans Company - in partnership with you" and a paragraph about the need for partnership working. To the right of the blue box is a paragraph about the HE info website being the main channel for sharing information. Below the blue box is a green box with the text "Latest HEI Bulletin..." and a link to "The September 2010 version of the HEI Services Bulletin can be accessed here.". To the right of the green box is a blue box with the text "HEI Services eLearning Catalogue" and a link to "The HEI Services eLearning Catalogue can be accessed here...". To the right of the blue box is a green box with the text "IMPORTANT - Student Support Seminar 2011" and a link to "The brochure for this years Student Support Seminar on the 9th & 10th March(including registration details) is now available.". To the right of the green box is a blue box with the text "Bursary Information" and a link to "OFFA have published a booklet to raise awareness of bursaries to HE Practitioners & HE Advisors.". To the right of the blue box is a green box with the text "IMPORTANT - Courses Service AY 11 /12 Launch" and a link to "HEIs can now commence their AY 11/12 course submission. Click here for further guidance.". At the bottom left of the page is a link for "Site Map". At the bottom right of the page are links for "Privacy & Cookies Policy" and "Terms of Use".

Portal login and administration

- Single Sign On
 - One login for all services in Portal
 - Different access levels for each service
- The role of the HEI User Administrator
 - Set up user name and passwords
 - Reset, unlock and expire passwords

Maintain contacts

HE services
partnering with colleges & universities

[Logout](#)

HE Gateway Home
Bursaries Home
Courses Home
Financials Home
Maintain Contacts
User Administration
Select HEI
Feedback

You are administering **UWAR UNIVERSITY OF WARWICK**

Maintain Contacts

[Bursaries](#) | [Courses](#) | [Financials](#) | [CoC](#) | [Other Contacts](#)

Contact List

Title	Surname	Forenames	Job Title / Department	Tel / HEI Office	Ext	Email	Roles	Edit
Mr	COOKE	PAUL	Student Finance Manager Student Finance	02476 522636 Academic Office		P.J.Cooke@warwick.ac.uk	CoC Contact	
			Assistant Registrar					
			Student Records and			Nick.I	Contact	
						Jane	Contact	
Add New Contact								

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BURSARIES SERVICE

Bursaries Service

An administration service to:

- **assess** student entitlement to HEI bursary and scholarship awards
 - Mandatory Bursary of £338
 - Discretionary as per Access Agreements/Fee Plans
- **notify** the student of their award/s and payment arrangements
- **schedule** and make payments subject to attendance requirements
- **report** to HEI operational management for financial planning & monitoring

Subscription

- By contractual agreement: New contracts effective from 31 July 2011
- Current subscribers:

Full Administration

- 124 HEIs in England and Northern Ireland
- 18 HEIs in Wales

Information Only

- 27 HEIs in England and Northern Ireland

- AY2011/12 Rollover: Rules can now be entered into Portal

SLC Administration Charges

Invoiced and payable annually in March

	Full Administration	Information Only
UK Students	£2.25	£0.50
EU Students	£12.00	£7.25
SCITTs	£3.10	£1.35

subject to VAT

Applications & Payments

AY2010/11 as at 31 January 2011

Total Number of applications:	988,029
Number of Students for whom award approved:	318,437
Total amount paid to date:	£ 63,779,597

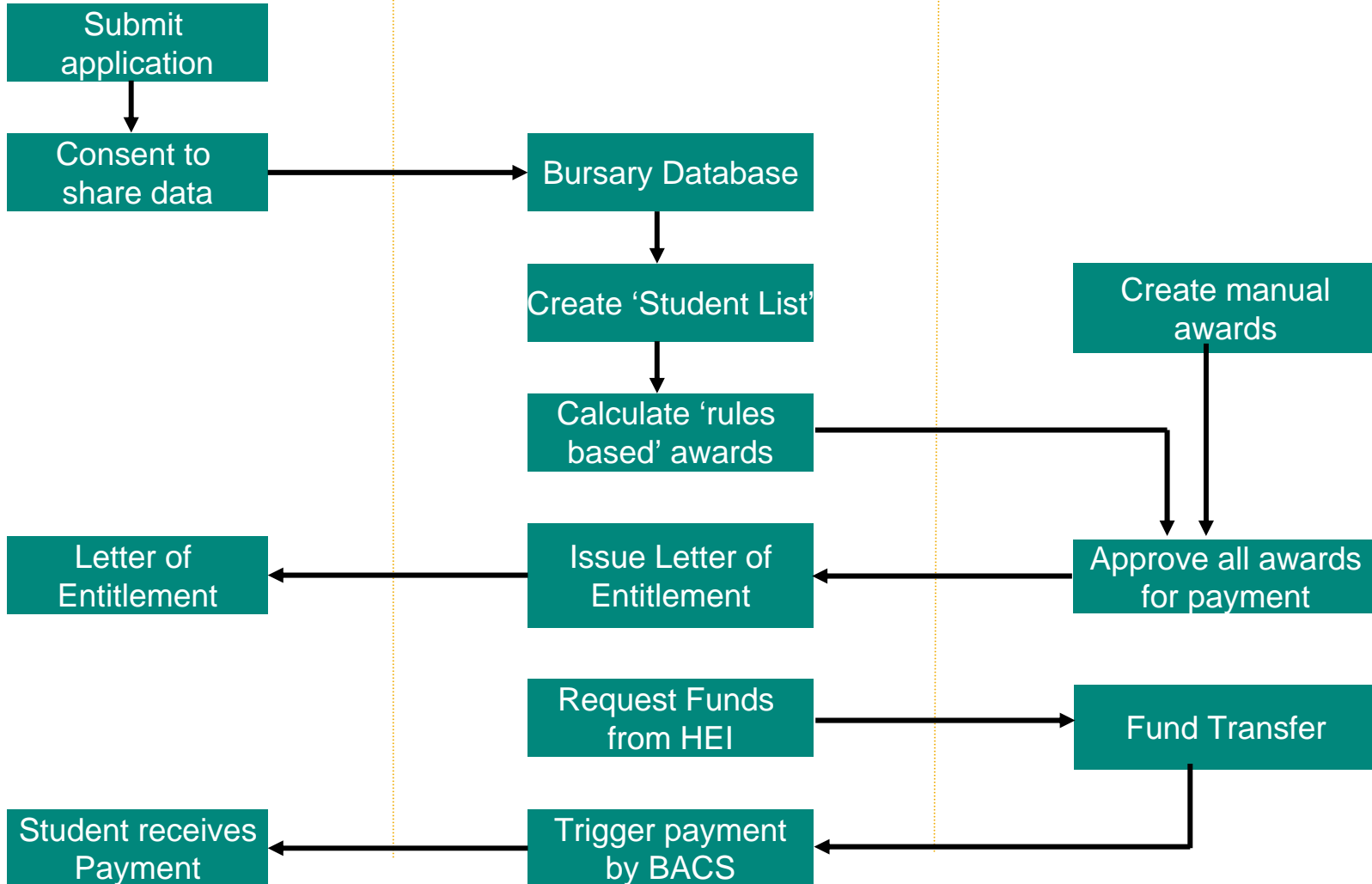
AY2009/10 as at 27 January 2010

Total Number of applications:	854,619
Number of Students for whom award approved:	265,905
Total amount paid to date:	£ 49,025,535

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Enhancements – Work in Progress

- Details of Evidence Status
 - Current Year Income (CYI), Self Certified (SC), Single Financial Assessment (SFA), Provisional or Full
- ‘Cohort’ filters, rules criteria and additional fields on reports
- Flag on Assessment screen for Maintenance / Special Support Grant
- Payment Profile details on Award Details screens

Enhancements – In Scope

- Deactivation of incorrect awards and automated award rejection
-
- Customised text for 'Cancellation Letter'
- Option to have 'emergency' payment without attendance trigger
- Ability to approve one award at a time where multiple awards apply
- Flag to highlight 'Notes' and ability to print out 'Notes'

Top Tips

Rules entry

- create a new 'Payment Profile' each AY
- remember there is a 'copy' function from previous AY
- 'Hints and Tips' sheet available from HE Portal clinic

Approvals

- reject 'transfers/withdrawals' first
- 'Approvals Report' available to download to check awards offline
- bulk approve up to 200 records at a time
- 'Approvals Action Status Report' to keep a record of your actions
- download a 'Student Payment Report' for financial forecast

Top Tips

Important checks: Prior to drawdown (10 working days) ensure

- all eligible students are approved
- all cancellations are actioned (& approved) incl students who have not met attendance triggers

Student Payments

- run 'Funding Report' on Day 2 drawdown to view funds requested
- run ' Pending Payment Report' to identify students who haven't met the payment trigger or have missing bank details
- remember to check for any failed payments at end of drawdown



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COURSES SERVICE

Importance of Supplying Course Information

- Mandatory function
- Feeds into Student Finance Assessment systems and allows students to find their course online when applying for finance
- Delays in submission of course information can impact student financial assessments
- Temporary course codes delays fee payments
- Course information is used in other area's i.e. Change of Circumstances

AY 2011 / 12 Courses Submission

As at 11 Feb 2011

- **HEIs Completed or Commenced**
 - Predicted no. of courses 82,260
 - Actual no. of courses returned to date 67,582 (74.69%)

- **HEIs yet to start**
 - Predicted no. of courses 8,218



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FINANCIAL INFORMATION SERVICE

Financial Information Service (FIS)

- FIS Administrators can maintain and edit
 - their own institutions website details
 - Supplementary Financial Information (SFI) i.e. the text which appears on Student Finance Calculators
- E-learning modules and User Guides are available

[Financials Home](#)[Awards Rules](#)[Supplementary
Financial Information](#)[Reports](#)[Select HEI](#)[HE Gateway Home](#)[Edit](#) 

Welcome to the Financial Information Services Portal

Welcome to the Financial Information Services Portal

Please note the following communication formats available for you to contact SLC with Financial Information Services (FIS) queries:

0845 702 3316

This is the telephone number for the HE Portal Services Team within the Business Services Department. You should call this team with all general FIS queries and to report any problems you are experiencing with the Portal.

If you are experiencing a problem with the Portal and the HE Portal Services Team can not resolve the problem for you, they will raise a system issue for our ICT colleagues to investigate and will provide you with a reference number to keep track of the issue.

If you have a query that you feel would require an in depth response, you should send your query to fis@slc.co.uk (You should not raise any system issues via this mailbox).

[Financial Information Services \(FIS\) Userguide](#) 

[Back to Top](#) 

- Financials Home
- Awards Rules
- Supplementary Financial Information**
- Filter Supplementary Financial Information
- Review Supplementary Financial Information
- Reports
- Select HEI
- HE Gateway Home

You are administering |



Supplementary Financial Information Details

Supplementary Financial Information for Academic Year 11-12 Help

HEI Website

Course Fee Information

Bursary and Scholarship Information

Other Information



Approval Status: Inactive

[Welsh Translation](#) 
[SFI Filter](#) 

Comment

No comment has been added.

Previous Supplementary Information Details

	Academic Year	Approval Status		
	09-10	Inactive		
	10-11	Inactive		

Student Finance Calculator

New or prospective UK full-time students can access the calculators

- For English students via Direct Gov /Student Finance /Finance for new students/Full-time students starting in AY..../Link to calculator
www.studentfinance.direct.gov.uk/calculator/studentfinancecalculator
- For Northern Ireland students via Student Finance NI
www.studentfinancenir.co.uk/calculator/studentfinancecalculator
- For Welsh students via Student Finance Wales
www.studentfinancewales.co.uk/calculator/studentfinancecalculator

Student Finance Calculator

Introduction

If you are from England and are thinking of going to college or university in academic year 2010/11 or 2011/12, this calculator will provide you with an estimate of the financial support you could receive.

The calculator gives an indication of what might be available for student loans and grants; as well as scholarships and bursaries from your place of study. The estimate is based on the information you give, so the more detail you can provide the more accurate the estimate will be.

Note that the estimate you receive is not an offer of support and does not guarantee your eligibility to receive student finance. When you apply for finance, you will need to provide supporting evidence to help us make an accurate assessment. Student Finance England will tell you what evidence to send when you make your application.

To begin, select 'Create a new estimate' or, to retrieve an estimate that you have previously created, select 'Access a saved estimate'.

[Access a saved estimate for 2010/11](#)

[Create a new estimate for 2010/11](#) →

[Access a saved estimate for 2011/12](#)

[Create a new estimate for 2011/12](#) →

Provided by

student finance 

Eligibility and Residence

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Questions marked with * are mandatory and must be answered before you will be able to continue.

Please enter your date of birth * (dd/mm/yyyy)

Are you a UK National? *

Yes No

[? Show help](#)

Have you been resident in the UK for three years prior to the start of your course? *

Yes No

[? Show help](#)

At any time since the 1st September 2006 has either of your parents, step parents, guardians, husband, wife, partner or civil partner lived or worked outside the UK and Islands, or in the case of an EU, EEA or Swiss National, outside the EEA or Switzerland? *

Yes No

[? Show help](#)

Please select the type of course you will attend. *

Please enter the Post Code of your permanent home address

[← Previous](#)

[Continue →](#)

Student Finance Calculator

Resize text: [A](#) [A](#) [A](#)

Student Finance Estimate

Provided by

The following assumptions have been made about you based on your age and have not been changed

Based on the following assumptions about you:

You are under 25, single, live with your parents and have no children or adults who are financially dependant on you; [Edit details](#)

You do not want your household income to be taken into account [Edit details](#)

You have not confirmed where you will be studying and/or details of the course you will be studying [Edit details](#)

You do not want more information on Disabled Students Allowance [Edit details](#)

You have not previously studied in Higher Education [Edit details](#)

You have no funding from any other source [Edit details](#)

studentfinanceengland

Options

- Save
- Print
- Apply

More Information

- Next steps
- Payment information
- Repayment Calculator
- Budget Calculator

You could be entitled to the following breakdown

	If you live at your parental home	If you live away from parental home
Maintenance Loan - Paid directly to you	£2763	£3564
Tuition Fee Loan - Paid directly to your college/university	£3375	£3375
Tuition Fee Loan - If you are studying in Scotland - Paid directly to your college/university	£1820	£1820
Tuition Fee Loan - If you are studying in Scotland - Medical - Paid directly to your college/university	£2895	£2895

[← Previous](#)

[Save](#)

Student Finance Calculator

Your university, college and course

You can use this search tool to find universities, colleges and courses that you are interested in. When you have found a university, college or course that you like, 'Add' it to 'Your choices' - this is like your shopping basket. You can add up to five different selections to 'Your choices'. When you are happy with your choices you can compare what support may be available for each one by choosing to 'View your entitlement'.

Provided by



Search

University/college name

Course name

University/college in

Sort Results By:

Page 1 of 7

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

[Next](#)

- [Your choices](#)
- [CITY COLLEGE BIRMINGHAM](#)
[Remove](#)
- [DURHAM UNIVERSITY](#)
[Remove](#)

University / college	Search for courses	Add to Your choices	View your entitlement
AMERICAN INTERCONTINENTAL UNIVERSITY LONDON	Search	+ Add	
ARCHITECTURAL ASSOCIATION	Search	+ Add	
BARKING COLLEGE	Search	+ Add	
BARNET COLLEGE OF FE	Search	+ Add	
BIRKBECK COLLEGE - LONDON UNIV	Search	+ Add	
BRITISH COLLEGE OF OSTEOPATHIC MEDICINE	Search	+ Add	
BRITISH SCHOOL OF OSTEOPATHY	Search	+ Add	
BROMLEY COLLEGE OF F.E.	Search	+ Add	
BRUNEL UNIVERSITY	Search	+ Add	
CARSHALTON COLLEGE	Search	+ Add	

Based on the information that you have supplied:

You have provided details of where you will be studying and/or details of the course you will be studying.

[Edit details](#)

The following assumptions have been made about you based on your age and have not been changed

Based on the following assumptions about you:

You are under 25, single, live with your parents and have no children or adults who are financially dependant on you;

[Edit details](#)

You do not want your household income to be taken into account

[Edit details](#)

You do not want more information on Disabled Students Allowance

[Edit details](#)

You have not previously studied in Higher Education

[Edit details](#)

You have no funding from any other source

[Edit details](#)

You could be entitled to the following breakdown

Use these checkboxes to display or hide the different types of finance in the table below.

Maintenance Loan Tuition Fee Loan Tuition Fee Loan - If you are studying in Scotland Tuition Fee Loan Scotland Medical

[Update](#)

[Expand all](#) | [Collapse all](#)

Product name	If you live at your parental home	If you live away from parental home
▶ -CITY COLLEGE BIRMINGHAM		
▼ -DURHAM UNIVERSITY		
Maintenance Loan - Paid directly to you	£2763	£3564
Tuition Fee Loan - Paid directly to your college/university	£3375	£3375
Tuition Fee Loan - If you are studying in Scotland - Paid directly to your college/university	£1820	£1820
Tuition Fee Loan - If you are studying in Scotland - Medical - Paid directly to your college/university	£2895	£2895

[More on bursaries and scholarships](#)

Options

▶ Save

▶ Print

▶ Apply

More Information

▶ Next steps

▶ Payment information

▶ Repayment Calculator

▶ Budget Calculator

[← Previous](#)

[Save](#)

Student Finance Calculator

Resize text: [A](#) [A](#) [A](#)

Bursary and scholarship information for DURHAM UNIVERSITY



Course Fee Information Full-time, home fee paying undergraduates will be charged a tuition fee of £3,375 in 2011-12 (the tuition fee for students on a year abroad or an industrial placement is set at 50% of the full fee).

Entrance Bursaries (The Durham Grant Scheme): Awards of £1,000 per annum will be made to all eligible full-time home undergraduate students whose household income is less than £25,000 (as assessed by your Awards Agency). For further details please visit the university's website at www.dur.ac.uk/undergraduate/finance/dgs/. For PGCE students Awards of £338 per annum will be made to all eligible full-time home PGCE students whose household income is less than £25,000 (as assessed by your Awards Agency).

Student Financial Support Officer, financialsupport.undergraduate@dur.ac.uk, Tel: 0191 334 6145

► [More information from the DURHAM UNIVERSITY website](#)

Student Finance Calculator

Resize text: [A](#) [A](#) [A](#)

Bursary and scholarship information for CITY COLLEGE BIRMINGHAM

▶ [More information from the CITY COLLEGE BIRMINGHAM website](#)



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STUDENT INFORMATION SERVICE (SIS)

Background

- A new service on the HE Portal where HEIs can
 - [View information](#) for their students with approved applications
 - [Confirm attendance](#) for the purposes of fee loans replacing previous Attendance Confirmation Report (ACR) process
 - Submit and view [Change of Circumstances](#)
 - Obtain [Financial Reports](#) to view remittance files and financial forecasts replacing previous Tuition Fee Position Report (TFPR)

Files for confirming registration at the start of term, the Student Support Attendance Request/Confirmation (SSAR/SSAC) will remain on ELP site.

Services available

View Student Information:

- This section is for information purposes to aid your internal business processes

Confirm Ongoing Attendance :

- Students that require an attendance confirmation will be presented on a worklist. Note
 - ACR files are no longer available on the ELP site
 - Returns cannot be submitted via ELP site or on paper
 - Normal business rules & timings apply

Services available

Change of Circumstances:

- Four different ways to submit online CoC
 - Ad Hoc from 'Create CoC' screen
 - From any student record (student information pre-populated)
 - CoC worklist automatically generated from objection attendance codes
 - Bulk upload via XML file

Financial Information run weekly to provide:

- Remittance files
- On screen Tuition Fee Balance



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FURTHER INFORMATION

Operational Queries

Support services and Help Desk Support for HEI staff:

- Call: 0845 702 3316
- Email: bursary@slc.co.uk - Bursaries
hei_data@slc.co.uk - Courses
fis@slc.co.uk - FIS
sis@slc.co.uk - ACR/Fees/CoC
bacspayments@slc.co.uk - SSAR/SSAC
- On-line User Guides available for each service

Information and Advice

- HE Services website
- One-to-one support from HEI Relationship Managers
- Regular HEI Services Bulletins
- Regional Communication Forums twice a year
- Email: hei_services@slc.co.uk





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