

© Student Loans Company Ltd	Financial Information Service User Guide
Business Services	Version 3



# FINANCIAL INFORMATION SERVICE

## User Guide

If, after reading this document, you require further assistance, please contact SLC Helpdesk Services on:

**Telephone:** 0845 702 3316 or

**Email:** [FIS@slc.co.uk](mailto:FIS@slc.co.uk)

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# Section 1

## Purpose of the Financial Information Service

The Financial Information Service (FIS) is an optional service offered to HEIs who wish to display their bursary and scholarship information on the Student Finance Calculators.

FIS allows HEIs to capture, view, edit and maintain their financial information which will be used to populate the 'Student Finance Calculators' and provide students with:

- A calculated bursary /scholarship entitlement (rules based awards)

and/or

- Supplementary Financial Information - web address, course fee information, bursary and scholarship information and other general contact details

Depending on the students domicile the Student Finance Calculators are available via

- Direct Gov - for English students
- Student Finance NI - for students from Northern Ireland.
- Student Finance Wales - for Welsh students. **Note:** As this service is bilingual a Welsh language option is also available.

Once the information is visible in the Student Finance Calculators it will allow prospective students entering higher education in academic year 2009/10 and each year thereafter to go online and obtain an indication of their national support entitlement along with information on the various courses and institutions that they are interested in.

## Section 2

### Accessing the Financial Information Service

The service is accessed via the HE Services Portal on the HE Services website - <http://www.heinfo.slc.co.uk/home.aspx>

#### User Access

The HE Services Portal operates on the basis of a single sign-on so you may already be familiar with this process when using the Courses service or Bursary Administration service.

- **Current Portal Users:** Will be able to access the Portal using existing login details (username, password and secret answer) however you will still need to have your User Roles updated (see below) to view Financials Service. Your nominated HES Financials User Administrator can add User Roles or alternatively contact [hei\\_services@slc.co.uk](mailto:hei_services@slc.co.uk)
- **New Portal Users:** Access can be arranged by contacting [hei\\_services@slc.co.uk](mailto:hei_services@slc.co.uk)

Full details on how to access the HE Gateway are provided in the following training manuals

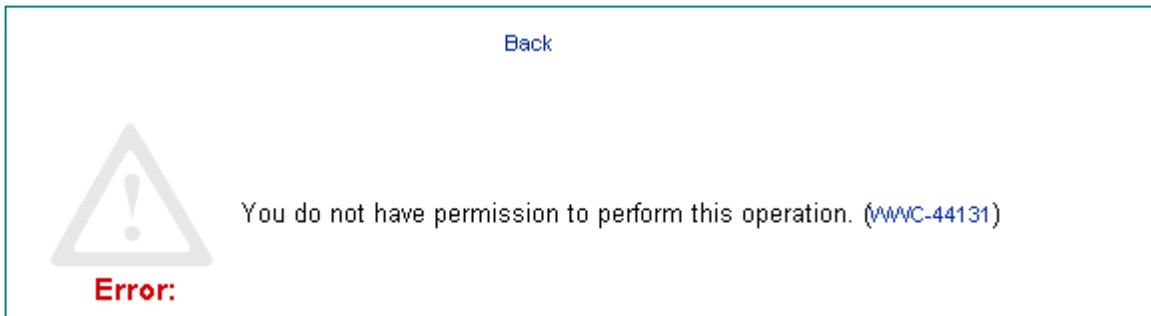
- Introduction to the HE Gateway
- HE Gateway for the HE Services User

#### User Roles

The services you can access in the HE Gateway will depend on your role in the system. The following roles are available within the Financial Information Service

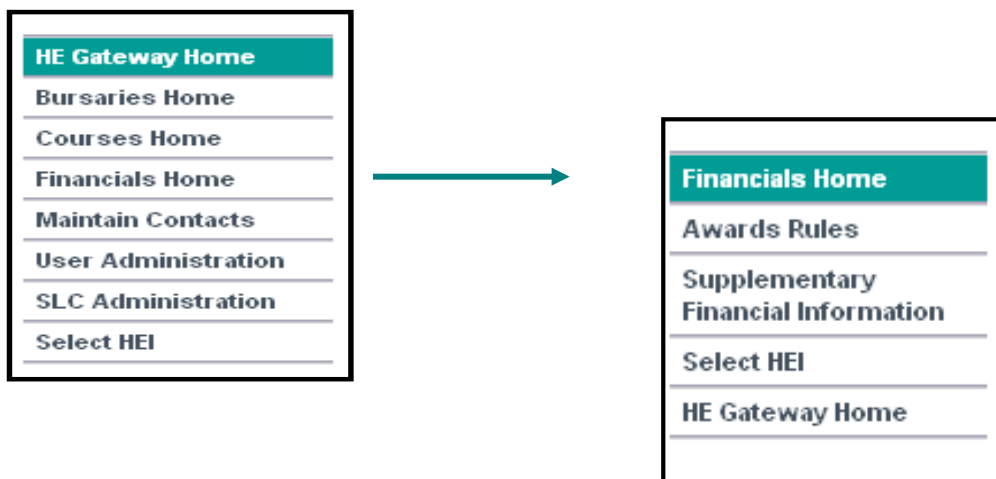
- **HES Financials User Administrator:** Users assigned this role will be able to administer all HEI users at their institution (including assigning of roles)
- **HEI Financial Information Services Administrator (HEI FIS Administrator):** Users assigned this role will be permitted to activate/deactivate the Awards Rules and view, edit and maintain the Supplementary Financial Information.
- **HEI Financial Information Services Advisor: (HEI FIS Advisor):** Users assigned this role will have read-only access to HE Gateway and Financials.

**Note :** If you are not authorised to access a certain service option or do not have the correct access /user role set up on the system the following error message will be displayed.



## Financials Home Page

The Financials Home page provides you with the links you need to administer the service and is accessed by clicking the link on the 'HE Gateway Home' page:



**Financials Home** – This allows you to return to the 'Financials Home' page once you have navigated to another area of the system.

**Awards Rules** – Allows users to filter for awards and view award details

**Supplementary Financial Information** – Allows users to view, edit, save and submit information for revision.

**HE Gateway Home** – Returns to the 'HE Gateway Home' page.

# Section 3

## Awards Rules

### Rules Criteria

This section caters for bursary and scholarship awards which can be 'system calculated' using any or a combination of the following rules based criteria

- Tuition Fee Amount.
- Household Income.
- Method of Attendance.
- Domicile.
- SLC Course Code.
- HE Maintenance Grant
- Special Support Grant.
- Course Type (e.g. PGCE, Other etc)
- Postcode Area (up to the first 4 characters).
- Age at start of course
- Course Year.

Each Academic Year, the Primary Contact at the HEI will be asked to submit details of their Rules Based Awards. If these rules meet the criteria they will be uploaded on to the system on your behalf by the SLC FIS Administrator.

*Note for Full Administration Bursary Service subscribers only: 'Active' awards which meet the FIS criteria will automatically be transferred over from the Bursaries Service to the Financial Information Service.*

**IMPORTANT:** Note that Awards will need to be checked and 'activated' by the HEI FIS Administrator before the information will transfer to the Student Finance Calculators.

The awards are accessed via the 'Award Rules' link on the 'Financials Home' page.

The 'Awards Filter and Awards List' screen is split into two separate sections:

- Awards Filter
- Filter Results

## Awards Filter:

You can search for awards by using the various options on the 'Awards Filter'.


The 'Academic Year' filter is mandatory however you can select any other combination of filters along with this. When you have made your selection click on the 'Filter' button at the right hand side of the screen.

The options are on the 'Awards Filter' are:

<b>Academic Year</b>	The academic year the award relates to. This is a mandatory field and an option must be selected.
<b>Award Name</b>	The name of the award, character length: min - 1, max – 30
<b>Status</b>	Displays if the award is 'Active' or 'Inactive'.
<b>Created on Bursaries</b>	Displays 'Yes' or 'No', depending which platform the award was created in. <i>NB: This is only visible to Full Administration Bursary subscribers.</i>
<b>Clear Filter &amp; Results</b>	The system will reset the values of the filter criteria in the 'Awards Filter' section and will clear the 'Filter Results' section.
<b>Filter</b>	The system performs a search based on the criteria selected.

## Filter Results:

Results will be displayed in the 'Filter Results' section at the bottom of the screen.

Filter Results		
The next results are for Academic Year 10-11. Click on the <i>Award Name</i> to view the full award details		
Award Name	Created on Bursaries	Status
<a href="#">251108 Amended Award in FIS</a>	No	Inactive ▼
<a href="#">ASTN New ThreeHeeHee</a>	No	Inactive ▼
<a href="#">ASTN New ThreeHeeHee</a>	No	Inactive ▼
<a href="#">Edited ASTN 261108 AYs</a>	No	Inactive ▼
<a href="#">New Award 171208</a>	No	Inactive ▼
		Update Award Status 

The Filter Results section of the screen will display the following information and option buttons:

<b>Award Name</b>	The name of the award, this also links to the 'Award Details' screen.
<b>Created on Bursaries</b>	Displays 'Yes' or 'No' depending which platform the award was created in.  <i>NB: This is only visible to Full Administration Bursary subscribers.</i>
<b>Status</b>	Displays if the award is 'Active' or 'Inactive'.
<b>Update Award Status</b>	Allows the user to amend the status of the award.  This action can only be undertaken by the HEI FIS Administrator.

## Indicative Award Details:

Click on the 'Award Name' hyperlink to display full details of the award and the rules criteria used to calculate entitlement. (known as the 'Indicative Award Details' screen)

Indicative Award Details				Help
Award Name	251108 Amended Award in FIS	Award Description	Amended this data so that on save I can produce an unrecoverable error.	
Created on Bursaries?	No	Termination Date		
Academic Year	Status	Status Changed By	Status Changed Date	
<input checked="" type="checkbox"/> 09-10	Inactive	VILLAOA1	26/11/2008	
<input checked="" type="checkbox"/> 10-11	Inactive	VILLAH1	12/01/2009	
Select whether the amount is to be a set value or a calculated value	Proportion of Grant			
Calculator Type: Proportion of Grant				
Maximum Amount Payable	5000.00	Minimum Amount Payable	3333.00	
Calculation Method	Round to Minimum Amount			
Round Amount Payable	To Nearest Pound			
Rules				
Household Income	is greater than	25000.00		

The 'Indicative Award Details' section of the screen will display the following information and option buttons:

<b>Award Name</b>	The name of the award will be displayed in this section, character length: min - 1, max – 30.
<b>Award Description</b>	The description of the award.
<b>Created On Bursaries?</b>	Displays 'Yes' or 'No' depending which platform the award was created in.  <i>NB: This is only visible to Full Administration Bursary subscribers.</i>


<b>Termination Date</b>	<p>Termination Date is the last day the student can be assessed for the award, in the format DD/MM/YYYY.</p> <p><i>This is only populated if the award is transferred from the Bursaries Portal.</i></p>
<b>Academic Year</b>	The academic year the award relates to.
<b>Status</b>	Displays if the award is 'Active' or 'Inactive'.
<b>Status Changed By</b>	The details of the last user that changed the award status.
<b>Status Change Date</b>	The date the last user changed the award status.
<b>Select whether the amount is to be a set value or a calculated value</b>	<p>The 'Select whether the amount is to be a set value or a calculated value', has two options:</p> <ul style="list-style-type: none"> <li>• Set Amount.</li> <li>• Calculated Amount.</li> </ul>
<b>Calculator Type</b>	<p>The 'Calculator Type', has five options:</p> <ul style="list-style-type: none"> <li>• Set Amount.</li> <li>• Grant top up.</li> <li>• Proportion of Grant.</li> <li>• Single band sliding scale.</li> <li>• Two band sliding scale.</li> </ul>
<b>Amount Payable</b>	<p>Amounts Payable - This section can be populated based on the Calculator Type selected above.</p> <p>As the Amounts Payable fields are dependent on the Calculator Type selected above, the display will differ for each Calculator Type.</p>
<b>Rules</b>	This provides details of the combination of the eleven criteria used to 'calculate' a students bursary entitlement.

## Rules Activation/ De-Activation:

### Activation:

Once the awards have been reviewed and you are satisfied that all rules criteria meet your requirements the HEI FIS Administrator will have to activate the awards by changing the status from 'Inactive' to 'Active'

1. Go to the 'Filter Results' screen

Filter Results		
The next results are for Academic Year 10-11. Click on the <i>Award Name</i> to view the full award details		
Award Name	Created on Bursaries	Status
<a href="#">251108 Amended Award in FIS</a>	No	Inactive ▼
<a href="#">ASTN New ThreeHeeHee</a>	No	Inactive ▼
<a href="#">ASTN New ThreeHeeHee</a>	No	Inactive ▼
<a href="#">Edited ASTN 261108 AYs</a>	No	Inactive ▼
<a href="#">New Award 171208</a>	No	Inactive ▼
		<a href="#">Update Award Status</a> 

2. Click on the Status Drop Down Box for the award you wish to activate and select 'Active'
3. Click on 'Update Award Status' button at bottom right hand side of screen.

### De-activation:

If, at any time after the awards are 'activated', i.e. live in Student Finance Calculators and calculating a students award entitlement you wish to stop the award being visible the HEI FIS Administrator can de-activate the award.

Follow the above steps changing the status to 'Inactive'.

If amendments are required to the award rules criteria contact the SLC FIS Administrator via [FIS@slc.co.uk](mailto:FIS@slc.co.uk).

# Section 4

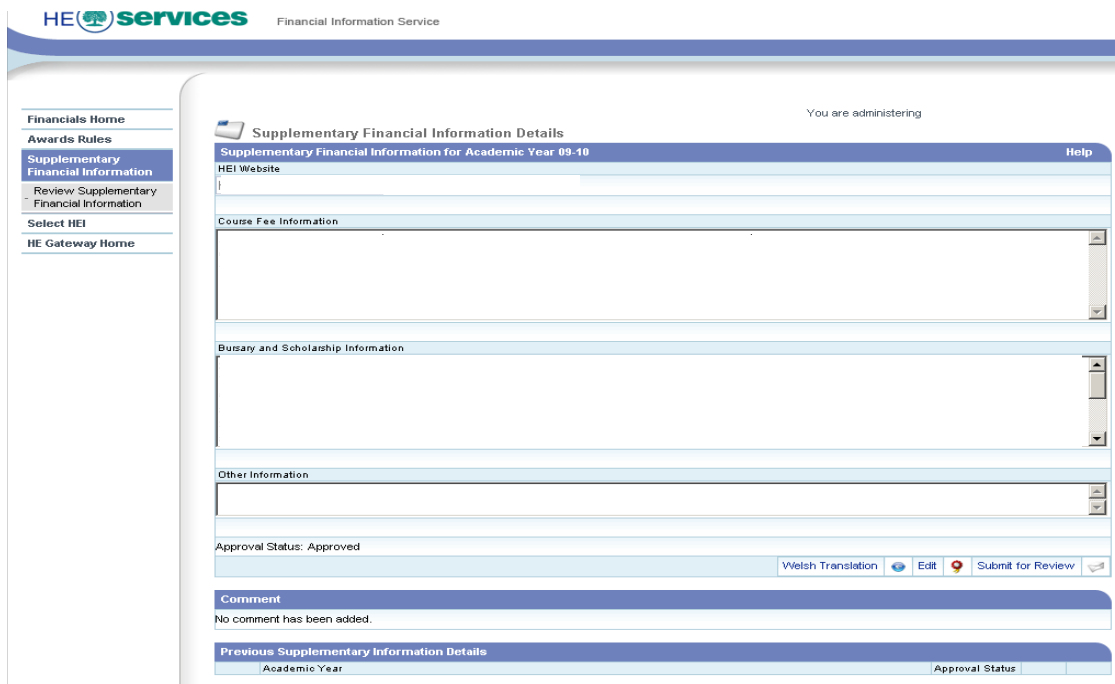
## Supplementary Financial Information

The Supplementary Financial Information (SFI) section allows HEIs the opportunity to add information in 'free text' format regarding their course tuition fees, any bursary and scholarship awards offered and general contact details to the Student Finance Calculators.

The HEI FIS Administrator will have direct access to upload, view, edit and maintain this financial information within the Financial Information Service however once information is submitted for review SLC will have to 'approve' this text before it becomes visible in the Student Finance Calculators.

### Viewing the Supplementary Financial Information

The 'Supplementary Financial Information' section has one section called 'Review Supplementary Financial Information'.



A description of the various fields on this screen are:

<b>HEI Website</b>	Institutions Website address ; Alphanumeric – max 300 characters, it permits slash '/' and colon ':'
<b>Course Fee Information</b>	Free text field ; Alphanumeric (Text) – max 5000 characters.
<b>Bursary and Scholarship Information</b>	Free text field ; Alphanumeric (Text) – max 5000 characters.
<b>Other Information</b>	Free text field ; Alphanumeric (Text) – max 300 characters.
<b>Approval Status</b>	<p>Displays one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Inactive</b> - HEI's have not yet provided information</li> <li>• <b>In Review</b> – Text has been submitted and awaiting SLC approval/ rejection</li> <li>• <b>Approved (Active)</b> - Information has been submitted and Approved by SLC FIS Administrator</li> <li>• <b>Rejected</b> – Text has been rejected by SLC and HEI must amend/resubmit.</li> </ul>
<b>Edit</b>	<p>Visible only when the screen is in the 'View' mode and the supplementary financial information is not at a status of 'In Review'.</p> <p>After clicking link, it sets the screen into 'Edit' mode, allowing the HEI FIS Administrator to update the information.</p>
<b>Save</b>	<p>Visible only when the screen is in 'Edit' mode and the supplementary financial information is not at a status of 'In Review'.</p> <p>After clicking link, it sets the screen into 'View' mode, saving any information updates</p>
<b>Submit for Review</b>	<p>Visible when the Supplementary Financial Information is not at a status of 'In Review'.</p> <p>After clicking link, it sets the status of the supplementary financial information to 'In Review' and sets the screen into 'View' mode.</p>

	An automated email notification will be sent to the SLC FIS Administrator to notify that the supplementary financial information should be reviewed.
<b>Welsh Translation</b>	Visible when the page is in 'View' mode. Welsh translation will automatically be undertaken by SLC FIS Administrators once the SFI text is 'approved' but this link will navigate an HEI User to the Welsh Translation page to view the text.
<b>Comment</b>	Free text field; Alphanumeric (Text) – max 10000 characters  This is only editable by 'SLC FIS Administrator' when the text is 'rejected'. It will provide the HEI with details of the required changes necessary before text can be 'approved'.
<b>Raised By</b>	Details of SLC FIS Administrator who created comments; Alphanumeric – max 30 characters.
<b>Date Raised</b>	Date comment was added. Format (DD/MM/YYYY).
<b>Previous Supplementary Information Details</b>	This section allows users to view the previous Academic Years supplementary financial information.  View the information using the expand/collapse functions.  HEI FIS Administrators can use the 'Copy' / 'Edit' functions when the screen is in 'Edit' mode

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## Editing the Supplementary Financial Information

This function is only possible for users with HEI FIS Administrator access.

For all other users (HEI FIS Advisors) the screen is displayed on a 'read only' basis, the details are greyed out and it is not possible to edit the information.

To enter text for the first time or to edit existing text in 'Supplementary Financial Information' ;

- 1) Click '**Edit**'. The fields available for editing become enabled. It will not be possible to edit if text is currently in a review cycle i.e. Approval Status showing 'In Review'.
- 2) Using the suggested style guidelines update the 'Supplementary Financial Information' as required.

**For Future Reference:** For ease of administration the information from previous academic years will be retained on the Portal. To access this information select the 'expand icon' at the start of each row, beside the 'Academic Year' required'. *(The expand icon is displayed as a cross + and the minus icon is displayed as a minus - . The default state will be +).*A '**Copy**' function is available should you wish to use any of this information in the current academic year that is being edited.

### Style Guidelines

- Enter the relevant information into the three sections ensuring that the maximum no. of characters (includes spaces) is not exceeded.
    - a. Course Fee Information - 5000 characters.
    - b. Bursary and Scholarship Information – 5000 characters.
    - c. Other Information: 300 characters.
  - The content should have a formal and neutral tone – students will perceive the Student Finance Calculators as part of Student Finance Services; we would not recommend one bursary or HEI over another.
  - Address the student as 'you' or use third person plural – 'Students can receive ...' rather than: 'The student can receive ...'.
  - Please use the word students rather than customers or applicants.
  - No bold, bullets, tables, *italics*, html, graphics or coloured text.
- 3) . Click '**Save**' to ensure that all changes /updates are saved.
  - 4) Click '**Submit for Review**' to send the data to SLC.

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## Supplementary Financial Information 'In Review'

A confirmation message will now be displayed at the top of the page advising that the Supplementary Financial Information has been saved successfully.

During the review cycle the text will only be available to HEIs in 'View' read only mode.

The status will now change to 'In Review' and an automatic email notification will be generated to advise the SLC FIS Administrator that there is information pending review.

SLC FIS Administrator will review text and has the option to either 'approve' or 'reject' text.

### 'Approved' Status:

A system generated email will notify the nominated HEI FIS Contact that the text has been approved and is now 'Active'.

- The Approval Status on the screen will be updated to '**Approved**'
- The SLC FIS Administrator will obtain a Welsh translation of the approved text and upload onto screens.

Active text is visible to students in the Student Finance Calculators.

### 'Rejected' Status:

A system generated email will notify the nominated HEI FIS Contact that the text has been rejected and outline the reasons why.

- The Approval Status on the screen will be updated to '**Rejected**'
- The Comments field on the screen will be updated to reflect the reasons for the rejection.
- The HEI will be advised to '**Edit**' the text and '**Resubmit for Review**'

A system generated reminder email will be sent to the HEI every 14 days until the review cycle is complete.

The text will remain 'inactive' during this period and will not be visible to students in the Student Finance Calculators

## Section 5

### HEI Branding

The Student Finance Calculators allows the student to search for their chosen institution using an alphabetical pick list and when displaying the HEI results will also provide the institutions logo.

It is therefore important to ensure that your details are kept up-to-date and as accurate as possible at all times.

Any changes should be notified to [FIS@slc.co.uk](mailto:FIS@slc.co.uk)

Logos should be submitted in the following format:

<b>Dimensions:</b>	larger than 60mm wide; larger than 40mm high
<b>File type:</b>	<ul style="list-style-type: none"><li>▪ tiff</li><li>▪ eps</li><li>▪ photoshop file - .psd</li><li>▪ freehand file - .fh</li><li>▪ illustrator file - .ai</li></ul>
<b>Resolution:</b>	no less than 300 dpi
<b>Colour:</b>	RGB
<b>Quality:</b>	Original artwork files only ( <i>Scanned copies result in inferior quality</i> )