

# Attendance Management – New Staff Transcript



## Lucy Marwood

Time is precious for this presentation. I've got a lot of information to give you in the time that we've been allocated, the 60 minutes we've been allocated. I am leaving time at the end for some questions. So, we will get around to any questions that you may have at the end.

So, for those of you who are in the room, it's great that you can make it face to face people. After two years, it's lovely to see you here. Thank you for coming today. And for those of you who are joining us out there in the virtual world, hello everybody. I hope you get a good benefit out of today's session.

For those of you who don't know me, and you may not know me, I started in this particular role as an HE account manager in June 2019. My engagement with my providers was somewhat curtailed by obviously, the pandemic, how many times we're going to mention the pandemic over the next two days.

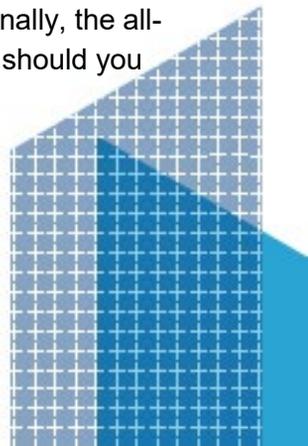
So, my name is Lucy Marwood and I manage all colleges, well, half of the colleges that do offer HE provision to their students. So, I work alongside my colleague here at Jon Leg and he does the other half of the colleges that also offer HE provision in England.

So, we're here today, I'm going to take you through the whole of the presentation. As I say, it's going to last around about 45-50 minutes, there'll be time for questions at the end. If you're sitting down at a table and you want to scribble anything down as we go along to ask us at the end, that's great.

As again, those of you who are joining us online, if you've got questions as we go along, please just type them in and John will be managing those questions at the end. And then hopefully, we'll get time to go through as many as we possibly can.

So, a bit about the content that we're going to look at today. It's attendance management, it's for new staff, it's fairly high level. I haven't got the time to go into the in-depth information on SIS but hopefully you will go away with the main points. And if you want to explore anything deeper, we can discuss that either out of the hub or as I say for virtually, you can just contact your account manager.

There will be time to look at the business functions that we use through the HE portal, it's focusing though mainly on the Student Information System, SIS, which I would hope most of you who are attending today are familiar with have we all got logins that's helpful. So, you all know what it looks like, so that makes my life a bit easier. We'll talk about registration and attendance, the two main functions that we asked you to do, through SIS, also a bit about change of circumstances and a focus on the withdrawal process as well. And finally, the all-important contact information at the end so you know where to get a hold of us should you wish to do so.



So, the objectives of today. We want you to by the end of today have a good understanding of the needs of the bent and benefits of a clear and comprehensive attendance management policy, and how it's going to help you and your student in understanding of what's expected of them, how it's going to help us to be able to make timely and accurate payments to you, at your HEP, but also to your students in terms of their maintenance support. As I say, it's a high-level overview of SIS, how you use it within your own organisation. I'm sure you will have those discussions in your own organisation. But it will give you a high-level overview of its functions in SIS and what we need you to do to make sure you do your registrations, attendance, confirmations, etc.

Does everybody know what we mean by SLC service standards? If not, the service standard framework document can be found on the HEP Services website. And within that it does hold the measures that we at the SLC do measure you guys and your performance out there in the HEP world. And it also includes the service definitions, and we'll talk about service definitions as we go through. As I say, we're going to look at COCs, change of circumstances with a focus on withdrawals, and then the final signposting to guidance, which is very useful and further support should you need it.

So, let's first of all, take a look at the business functions. So, in order to manage the SLC processes between ourselves and you as HEP providers, we use three main systems. You may be aware of our CMS system, our course management system. We ask you to provide all your course information on that system at the beginning of the year, then that feeds into the student information system. And as I say, the primary focus of today's presentation is this. And then finally, there is the bursary administration service.

So, let's talk a bit about CMS, Course Management Service. As I said, we at SLC ask HEPs to upload all the details of the courses they are planning to run each academic year on the course management system. And that includes things like your term dates, your fees, etc. Now, this enables us then to open the application service to students who are thinking of doing an HE qualification at your particular organisation. The information you provide on CIS is vital, I can't stress that enough. It needs to be accurate, so we know the term dates that you're going to be running for each of your courses. The term dates will also have an effect on student's entitlement to their maintenance support. There are a couple of CMS workshops running over the next couple of days which will go into more depth about CMS. So, I'm not going to hang around on CMS for too long.

As I said, we will be focusing on the functionality of the student information system. And this is where you're going to be able to view your student information, early doors rarely. Where you do your registration and your attendance confirmations, where you do your change of circumstances, you tell us if somebody, if a student's circumstances have changed, which may affect their entitlement, and it also gives you the ability to access details of the payment of the fees that we make to you.

And finally, the Bursary Administration Service, which we'll call BAS. Now, this is a paid for service, I'm not sure whether all of you will be familiar with BAS, you may not have signed up for this service. But it enables HEPs to ask SLC to manage their bursary payments on their behalf. And if you are interested in using the bursary administration service, please get in contact with your account manager and they can take you through the particular details of that system. So those are the three main systems that we use in sort of the background, operational side of the interactions that we have between SLC and HEPs.

Now to get on to any of these systems through the HEP got gateway, you've all been assigned the username and that login. So, you've all got that, it's all imprinted in your head so you never forget it, you log in every day and if you're like me, you go away for two weeks come back from a holiday thinking I've forgotten it or forgotten it. But please try not to forget it. I know we've now added that functionality, that if you do forget your password, you can reset it. But you are aware that obviously to get on to the HE gateway, you will need to have that access. And depending on what access roles you are given will depend on whether you have access to CMS and what access levels you have on SIS.

So, before we get into the main body, it's always useful to put a bit of context on the timeline that we use at SLC. Some of you may be very familiar with SLCs timeline, we have quite a strict time timetable in place so we can get students applications in and we can process them before the start of the academic year. So, this slide gives like gives you details of the ways that we asked you to interact with us through CMS and through SIS to ensure that we make payments to students on time, and those payments are accurate. So, I'm briefly going to take you through the timeline. So, in November, we open CMS. So, we will email all the contacts we've got on the HEP gateway who are come under the CMS tab, and we will ask you to start uploading your full-time undergraduate course details from November onwards. Then also we will ask you to provide any Scottish postgraduate courses as well at the same time. From March to April, we asked you then to provide your part time course submission. And then finally, it's the postgraduate course submission. So, we stagger it, so we can open the application services in a clean way.

So, January whilst you're submitting all your course information coming into us, we have a dedicated team of service managers who validate all that course information that comes to us. So, we go through a validation process and that takes place for mostly through January and is ongoing for full time. And then we started doing the part time validation in March and April, and then again, the postgraduate validation of the course information you're providing on CMS. So, once we've got all your course information in and if we get at least 85 percent of course information in in February, sort of end of February, beginning of March, we aim to open the

student finance application for full time undergraduate students. So, we aim to open it as soon as possible so we can encourage students to apply early. So, like you saw in the plenary with Paula, we can avoid those peaks of processing.

Then in April to June time, we open the part time application, and then also finally the postgraduate application. So, your students are away, they're making their applications, they're getting approved, they can see they get their entitlement letters coming through, everything's good on their side. This is where you can then start seeing the applications come through SIS. Once the application is approved, you will be able to see those applications coming through SIS and then the process starts for you.

The first thing we ask you to do is registration and then obviously, more importantly is attendance confirmations on three separate occasions. So, calls to action are our registration and attendance confirmations and also throughout the year, you will be submitting Change of Circumstances through SIS as well. And then once you do your attendance confirmations, we make those termly three liability points payments to you in the third Wednesday in October, the first Wednesday in February and the first Wednesday in May. So, if there's anything you've taken out of that slide is the first Wednesday in May. So that's the next liability point coming up, just a little note there that attendance confirmations will need to be submitted for the final 50 percent for a winter start course.

So that's the timetable. You can see, as I say, those are the main interactions we use through SIS, and CMS. And we're going to concentrate now on the all important SIS. Everybody is very familiar with SIS. If you're like me, you log on to it nearly every day of your life. You dream about it, you often rant about it. But that's the system that we use and that's what we've got at the moment. And to get access to SIS, you're going to go via the HE website, HEP Services website. I hope you're all familiar with that, I really do. That's the HEP services website. That's where you will also find a lot of useful guidance documents. So that should be your first port of call if you have got a question on something to do with SIS or CMS, the guidance documents are all there and they will often give you the answer to your question. So that's your first port of call. It also has useful contact information. So, it will have the ATP account managers contact information as well as the Partner Support Desk contact information. So that's the HEP Services website.

So, once you've got on that, you're going to click to enter that lovely screen. Welcome to the HE gateway. Now the HE gateway depending on what access roles you have, and what access levels you have will show you what services you can use. So, you can see underneath HE gateway home, the first one is bursaries.

Now if your organisation hasn't signed up to the bursary system, you won't be able to view that. The next one then is the course management service. Again, if you have the access roles to get on to the course management service, you'll be able to access it again from the HE gateway, but the one with the ring around it, that's what we're going to look at is the SIS home.

Briefly want to mention the maintain contacts underneath SIS home. We are anxious to make sure all of the contacts on the system are relevant and they're up to date. So could I just put a plea out to you all, could you just please make sure that contact information on the HE gateway is relevant and it's up to date. If you've got to add new contacts, that's great. But also, if you've got colleagues on there who no longer need access to the system, please could you take their contact information off. Just another point about the contact information is we use it to send our email shouts out as well. So, if you didn't get notification of maybe today's event or other events that we've got coming up or prompts to action, it may be because you're not down as a named contact on the HE gateway. And another point about contacts is if you do want to use a partner support desk, they will only speak to you if you are a named contact on the system. So just be aware the contacts are really important. So please just make sure they are up to date, and they are right.

So, as I say, we are going to look at SIS, so you've clicked on SIS home, and this is the view that you're going to see. So down the side of the page, you'll see the whole menu of the functionality within SIS starting with the student information at the top, and then registration, and then attendance and then the change of circumstances. Those are the three parts that we're going to focus on today. So as I say, depending on your access levels, when you get set up on the system by the whoever is the user administrator, at your particular organisation will depend on what level of access you get, it may be just read only, you may just be able to view the information or you may have the full access where you can get into all the information, including the financial reports and you can export information etc.

So, let's have a look at the functionality within SIS. As I said earlier, there are particular parts of SIS where you can go in and view your student information once those applications start coming through from February onwards. You confirm the registration through SIS for your students, you confirm attendance. So those, as I say, are the two main action points that we ask you to do throughout the academic year. Change of circumstances as well, you will submit your change of circumstances through SIS, that may be either as a bulk import or maybe just for individual students. And also finally, which we haven't got really time to look at today but if you wanted to have more information about financial reporting, we can speak to you as an account manager, but there are the financial reports available on SIS. So, there's all the remittance advices on SIS, so you have a good understanding of the income that's coming through from the tuition fee revenue for HE.

So, the first part of SIS that we're going to concentrate on today is that view information screen. I hope you're all familiar with that. Yeah, it's pretty user friendly, SIS is. You can't do much wrong. And if you do do something wrong, you think oh, I shouldn't click that, something's gone wrong here, just get in touch. We can usually unravel anything. But we'll talk about our view student information page and why it is so useful for you.

So, as I said earlier, once the application has been submitted by your students, it's been approved, it's all gone through, they've got their Entitlement letter, they're happy because they know they're going to get their maintenance support, you will be able to start seeing those applications coming through. So, when you go back to your offices, you may want to filter on the academic year 22/23 and start seeing those applications are already coming through for your courses that are going to start in the next academic year. You can start creating lists. So, if you want to create lists using the view student information pages and export them into your own systems, you can use the filters on the system, you may want to use look at particular courses. So, if you click on the tab at the top where it says core search, it will take you to a different screen and you can then put the SLC course code in that particular filter, click on filter and it will bring back all the students who have made an application for that particular course.

You can click on mode of study. So, you may want to see how many students when we opened the part time application later on in the academic year if you've applied for part time support. Again, use the filters to build up your own work lists, you may want to export them and import them into your own systems. It really depends on you and your own internal processes on how you use the view information system. But I would encourage you to start looking as early as possible as to your approved applications that are coming through. You may want to start looking at those students who haven't perhaps had provided us with a National Insurance number. And you know at SLC, how the importance of a national insurance number is to us. So, whilst we will do the prompt for a student to provide us with that national insurance number, you may want to get in contact with any student who hasn't provided us with a verified National Insurance number. Because without that, we aren't going to pay the student and more importantly, we aren't going to be able to pay the HEP their tuition fees.

You also may want to look at those students who haven't been able to provide us with verified bank account details because again, without that information, we cannot make their maintenance payments to them. You can also, as I say, make work lists, you can use the date range functionality to make work list to see how many students have applied within a particular date range. So just go into the view student information page, have a play around, use it to make your life a bit easier when it comes to the start of the academic year so you will be able to see what applications are coming in. You can see what applications are coming in for perhaps particular courses, etc.

So best practise, some hints and tips. As I said, as I keep on saying use that system, use the view information system to check for applications. If you want to check for individual applications, you can do that or if you want to check for numbers on particular courses, whether they're viable to run, please use that view student information. The other thing you could be able to view from SIS is to be able to look at those students where their tuition fee loans may have not been approved, because they're not entitled to it. So those zero assessments, or those students who have decided not for whatever reason not to take out maybe any of the Tuition Fee Loan, or just part of the Tuition Fee Loan.

That gives you that early opportunity to get in contact with students who maybe have a zero assessment or reduce loan that they've requested and have discussions with them about how they are going to pay their tuition fee cost to you.

The other thing that we would encourage you to do as early as possible is to start submitting change of circumstances, the pre-liability change of circumstances, which corrects any information that maybe the students have got wrong. This could include fees, or it also could include the course as well. Use the system to make work lists and export any information from SIS into your own systems.

So that's the first part of the process. Everything's going swimmingly along, you're coming to the start of the academic year, and we know life gets really, really busy for you guys out there. And so of course, SLC start making demands on your time even more than the students do. And the first thing that we asked you to do is registration. So that is the service definition for registration. I'm not going to stand here and read that out. If you really want to have a look at the full-service definition of registration, as I say, it is available on the HEP Services website, in that document and that service management document.

I mentioned service standards earlier on. SLC have a set of service standards which as I said before, we measure HEP performance against. And part of our role as an account manager are the fact that we do measure your performance, HEPs performance against this set of service standards. And the service standard for registration as you can see there is we asked you to submit 82 percent of registrations within five days of the term start date. And then 95 percent of registrations within 30 days of the term start date. Registrations will release the student's maintenance support for the full academic year unless you tell us otherwise. So, you only have to do it once it's the start of the academic year, it's the busiest time, but it's vitally important that you get these through to us as soon as possible so we can make those payments to the student as soon as possible.

So best practise about registration. As I said, it releases that student's maintenance support, it stops those phone calls saying, I haven't had my Maintenance Loan, where's my maintenance payments. We know students will contact you, they will contact us peak in our call times, where is my Maintenance Loan. So, the sooner you can get your registrations done, the better. Payments will be made to the students based on those turn dates that you have provided to us on CMS. That's why we do all the validation process and that's why the information you provide on the course management service is so vitally important to us and to the students to make sure that they get timely and accurate payments. The registration word list which the system will automatically draw back for you, so you haven't got to go in and do any searches, it's there and available for you 30 days before this course start date.

Now, if you are 100% sure that that student is going to turn up and is enrolled on the course, you can do your registrations 30 days before the start of the course. So, it gives you a bit of an opportunity to get ahead of the game if you like. So, they are available 30 days before the start of the course. But as I've said before, you should only do the registration if you are confident that that student has enrolled and is going to turn up to that course.

And just a brief note that when you do your registrations on the on the work list, the filter will give you an option of R or Y which is yes, they're here, they're going to come, we can release their maintenance support, or a no, an N code. The N code will cancel a student's application, so just be a bit mindful of when you're going to submit that N code.

So, there you go. That's the registration work list page. I'm sure you are all familiar with that. The system, as I said previously, will automatically bring back all those applications that require a registration and are available to you on the system. How you organise your registrations is entirely up to you in your own organisation. Some will do bulk exporting of the registration work list, import it into your own systems and then put it back into SIS. Some of you smaller organisations will be able to manage it manually. But both options are available to you.

What you won't see on that registration work list are those students who are European domiciled students, you won't see any students who are studying abroad, you're not going to see placement students and you're not going to see students who have not requested a Maintenance Loan. So, the system will know the type of student that needs a registration confirmation and will automatically bring it onto that work list for you. So, you haven't got to do any searches on the system.

So, a bit more about the N code. The N code, as I say, is there for those students who have not registered, who have not enrolled at a course at your HEP and you're expecting them to come along and do the course. As I said earlier, just be mindful of when you submit N codes because it will automatically cancel that student's application and will automatically complete the change of circumstances for you. So, you haven't got to go on to the work list. Submitting the N code means that if a student may not be coming to your organisation and hopes to register with another organisation to do a different course, somewhere down the road perhaps, if you submit the N code, that application will not be able to be what we call manually registered by that second institution. So just be mindful.

We would recommend best practises if you leave it from 28 days of the start of the course or if a student actually does phone you up and does actually communicate with you and say, actually I've decided HE isn't for me, I'm not going to take a place upon the course this year at any organisation, you can quite confidently submit the N code. But the N code will cancel that application. So is a student is trying to apply somewhere else in terms of their student, to attend at a different organisation and you've submitted an N code, that application is going to have been cancelled. So, they're going to have to start the whole process again and that's not a good student experience for anybody.

So, registrations done, you think oh, that mammoth task is sorted, I've survived enrolment, I've done the registrations, we've hit the target. SLC now wants us to do attendance confirmations. You haven't been able to have time to put your feet up, have a cup of tea and now we want you to do it all over again but for attendance confirmations. And you can see the service definition for attendance. Again, I'm not going to read it out. Again, if you want to have a look at the full definition, please go into that document onto the HEP Services website.

Again, SLC has a service standard which we use to measure HEP performance for attendance, and we ask you to submit 85 percent of your attendance confirmations by the due date for the earliest payment. It sounds very complicated, very convoluted, but it's not really. The earliest payment for each liability point, which I'm going to talk a bit about later. And then the final two are 95 percent return before the 30 days from the due date and 98 percent return before 60 days before the due date. Now we appreciate that 85 percent, there is a bit of wriggle room there for those who have term dates that may start a bit later on in the academic year. So, there's a bit of wriggle room there. You may have a cooling off period, which means you can't hit that due date. Again, there is wriggle room there. And when we as an account manager start looking at all the stats that come to us on a weekly basis about attendance and REG, we will take all of that sort of thing into account. So, we will look if you haven't done attendance confirmations for a particular cohort of students, we will be checking CMS to see when that course started and we will be making those calls out as to whether we think there's an issue or not. So, we do understand there will be factors which may mean you can't hit that 85 percent.

As you know, attendance confirmations means that we're going to release those payments to you for the tuition fees for those students. We ask you to do it three times during the academic year. And once you have submitted those attendance confirmations, those students will now become liable for those tuition fee payments and start accruing interest on them. Attendance should only be confirmed after any cooling off period. Now, each HEP will probably have a different cooling off period. And again, we will try and take that into account, but it's impossible for us to know every individual HEP cooling off period. So, we may have to get in contact with you just have a bit of clarification on that.

But you can see the way the payments are based. So, for those for a winter start course, sorry autumn start course who start a course between August and December, we make the payments to you that third Wednesday in October and that would be 25 percent. First Wednesday in February, again 25 percent. And the big one that's coming up the 50 percent, first Wednesday in May, which means we need you to do, everybody's scribbling this down, for you to do your attendance confirmations by the 28th of April..

Everybody panics, oh God, let's put that in my diary quickly. 28th of April, we need to do your attendance confirmations by that date so we can make the 50 percent final tuition fee payment to your, to your organisation for those who have autumn term starts. And then you can see, depending on which season your students start their particular course will depend on the date we make the big payments.

After the main, but if you miss some of the main payment date, and there's a few students who you're not going to be able to do attendance confirmation for whatever reason, we will still continue to make payments each Wednesday after those main payment dates. However, to be sure that you get the payment on a Wednesday, you've got to get that attendance confirmations to us by the close of business on the Thursday before. So, Thursdays and Wednesdays are really important. Just remember to get your attendance confirmations, check your attendance work list every Thursday because there may be late applications coming through. So, if you can get those through to us, get those submitted on the Thursday, we can then guarantee a payment to you by the following Wednesday, all right.

So, attendance work list. Again, the system will bring back all the students where we need an attendance confirmation to be submitted from you. And when you click on the filter, you will see there are eight attendance codes, who knew we needed so many attendance codes for you, just to make life a little more tricky. So those eight attendance codes depending on which code you submit to us will depend on whether we are able to release that tuition fee to you, or whether we're going to ask you to do a change of circumstances to tell us why we can't pay the tuition fee to you.

So, I'm going to briefly go through the attendance codes for you. So, there are only two, which means that the two attendance codes, which means we are able to release the tuition fee payments to you. The first one is the A code, obviously that students in attendance, submit that to us. You have then told us that that course and fee information is correct for that student. If it's not, we would ask you to do a COC just to confirm the correct course of information. Also, you may start to see applications coming back through on the attendance work list and you think, I've already confirmed attendance for that particular student. However, if you've submitted a COC a change of circumstance through the system, we are going to need you to do another, confirm the attendance again just to tell us, yes you are happy with that change of circumstances information on that student. So you may have that thing of thinking, I know I submitted attendance confirmation but they've appeared back on the work list, it's probably the reason why is you have submitted change of circumstances and the system is now asking you just to say yeah, that's okay, we're happy with that, and submit it again.

So, I'll just say the only two positive attendance codes you'll be able to use. The rest are negative. So, if you submit a D code or C, F, N, X or S you are going to have to tell us the reason why. Certainly, for this C code F and N and X codes, we are expecting you to raise a change of circumstances to tell us why you cannot confirm attendance for that particular student.

The D code. The D code, I'm going to go through a bit now. It's only available for the first liability point. So again, you are telling us that that student has never turned up to your HEP and they've not enrolled on their course. It automatically removes that student from your work list, and it will automatically do a change of circumstances to tell us that the student has not attended. So just again, be aware of the D code, it will cancel the application for that student. So please just be mindful when you use that code. But you use it sort of later on in the term because if you do submit a D code, it will cancel the student's application.

As I say, for any of the other negative attendance codes, we're going to ask you to raise a change of circumstances and those student's records will automatically appear on your COC work list. And you work through that list and submit the appropriate change of circumstance.

So, some points to remember. Please only confirm attendance after you have registered the student with the appropriate awarding body. An example of this is Pearson. We would ask you to register your students with Pearson before you submit attendance confirmations. We do QA checks and if we do find that an HEP isn't compliant, there is action that we can take, but that is an important point to raise here.

Attendance confirmations, you should really be doing them for the earliest liability first of all. So, if you're coming to do your attendance confirmations for the third term and you think I've got attendance confirmations outstanding for liability too, please check why they haven't been submitted earlier, but also submit those before you do the third liability point. You can use the filters on the attendance work list page to check for those early liability points for which attendance confirmations are outstanding. You can also use the save functionality. However, saving attendance confirmations doesn't mean they've been submitted. This is a common problem that we've had people think yeah, save them, done them, they're off. And then your finance people come to you and say, we haven't had for any tuition fee payment, what's going on. And then you go back into SIS and you think, oh, I haven't submitted them. So, if you are saving them for whatever reason, you may have to go away and check some information, please remember to submit those saved attendance confirmations.

Best practise. Again, just to reiterate, filter on all the students with late confirmations for previous liability points before confirming the next liability point. Ensure that any negative attendance codes are followed up with a change of circumstance so we know why you can't confirm attendance for those students. And also, we would ask you check your attendance work list regularly and clear them down regularly. As I say, you may have submitted a COC and it may mean that we have to claw back finance from your particular organisation. But without you submitting that A code, we cannot do that. So please go back to your organisations and check your attendance work list and make sure they are cleared down for all previous academic years as well as this year. And then hopefully you can start off with a lovely clean sheet of attendance confirmations for 20/23.

So, attendance confirmations have gone through, registrations have gone through, everybody's happy, but now we're going to take a look at change of circumstances. Things happen. Students change their mind students decide to withdraw, things happen. Which means we need you to tell us why the student may have to have a pause in their application or make changes to their application etc. And so we ask you to submit a change of circumstance. And there is again a service standards which we measure you against. So, we asked you to do 75 percent of course and fees change of circumstances within two weeks of the course start date. So that means when you confirm attendance, you are confirming for that student who's on the right course and the right fee is being charged. So that's the measure that we ask for change of circumstances.

So, there are two types of change of circumstances, two stages of the application. So pre liability, this is before the term start. Now your students can do some change of circumstances themselves if you would ask them to. They can change their course or institution. They can go onto their online application and make that change before they have enrolled or registration has been submitted for them. They can change their fee amount. So, this is why we do suggest that you check those applications as they come in to make sure students have put the correct fee down. They can request additional funding through their tuition fee loan or Maintenance Loan. So, if they haven't requested the full amount, they can go and request the full amount if they want, change bank details and address details.

Before the first day of terms, you can transfer students into your institutions. So, if a student comes to you and said, I want to come due course here, you can do a manual registration through SIS and also we can change the course and you can change the fee amount.

Post liability, that's when the student has been registered and it's after their first day of the academic term. Students again can make changes to their loan requests and request additional funding if they want and update contact and bank details. You can do far more, you can transfer students into your institution, you can suspend a student, withdraw a student, change the fees amount for a student, change courses for the student, resume a student when they've suspended and returned to their study and also a repetition should the student have to repeat any part of their course.

So, let's have a look at those in a little more detail. So, transferring a student to you as a provider. This will allow you to get, as I say if a student turns up, say I want to come and do a course here, you can manually register that student and transfer them in and so they won't have to make another application or do their own COC. You can correct any errors on the application. So again, course or fees. And you can also move a student to a different course, within your organisation.

Repetition, this is where we ask you to notify us of a student who fails to progress to the next year of the course and has been given that option to repeat that year. We will then do a reassessment on their eligibility and if the student is no longer entitled to that tuition fee, you will then start to see the zero-reassessment come through on SIS. And that's when you can have that conversation with the student about how they are going to pay those tuition fees.

Suspension, so some students may want to take a break in learning for whatever reason. So, you can then tell us via SIS, the date the student has suspended, and then we will then be able to stop any fee payments to yourselves during that period.

Resumption, so that student's come back after suspending. We need to know, so you need to tell us via SIS that students back, they are in attendance So we can then recalculate the fees and also the maintenance support for that student.

Fees. As I say, we ask you to provide us with the correct information on SIS so we can make the correct payments to you. If the fee is increased, the student will be given the option to increase their Tuition Fee Loan if they want to as well.

And also credit, so these are for your part time students. So, you need to tell us the student who may have changed the intensity of their part time course A credit CIC was going to reassess any maintenance entitlement for that particular student.

You may notice there is a big a big hole there, one that we haven't hit, the withdrawals. I'll talk about the withdrawals in a bit. So, use your COC work list, use the COC homepage page to view the COCs that are coming that have been submitted and also use the work list, for the COC is that we need you to submit if you haven't been able to submit a positive attendance code. You can filter on the types of COCs that have been submitted for your own record. So, if you want to see how many students may have withdrawn from a particular course, use the filters. You can check the status of the COC. You can filter whether it's a full time or a part time course and also you can check those that have failed the automated processing of COCs and have been kicked out to be manually looked at by one of our colleagues.

So, what we do advice on SIS is that we ask you when you do the COCs is to least have two contacts. The hidden, you may have noticed that we've had an enhancement that we put into the system last year where we hit the notes field. If you put a note on the system on the COC it automatically kicks out any automated COCs for manual processing. So, if you can avoid putting a nice note saying thank you very much for processing or I hope you have a happy Christmas, please do so. As much as we love to see them, it does mean that that COC is kicked out. Please be mindful of peak processing times. Just be aware that our SLA is to do the manual COCs within 20 working days off peak and 30 working days during peak period, and peak is between August to the end of November. If you are tracking your COCs, and any COCs are taking longer than 30 days to be completed, to be submitted, please contact colleagues at that email address, coc@slc.co.uk and they will investigate it for you. All right.

So, as I said earlier, withdrawals, that's the big one that we're looking at today, I'm going to focus briefly on withdraws. And again, that's the service definition for withdraws. And again, we have a service standard where we ask you to submit 80 percent of withdraws or report it to us at SLC within 60 days of the effective date. Now 60 days does seem quite long. However, I know that you do have internal processes within your own organisation, which means it could take up to 60 days for you to be able to notify us. So, if you, a student, decides to withdraw from their course early, they need to get in contact with you guys as early as possible. So, you are able to start taking the appropriate actions to tell SLC the student is no longer in attendance. Early notification is going to prevent overpayments to both yourselves and also the student. Because if a student withdraws from their course, we will automatically ask for those payments to be repaid as soon as possible. It can cause quite a lot of stress and financial hardship for students when we ask for large amounts of money back in one go. So please tell us as early as you possibly can if a student has withdrawn from their course.

So, the effective date, so when you're submitting that change of circumstances for a withdrawal, we are going to ask you to put the effective date of when the student has withdrawn. And the effective date is the date on which the student's status has changed within the HEP. It may not mean the last time they swipe their library card to get entry to the library, they may have been doing some online learning, they may have been doing some engagement organised by tutors. So please just be aware, it's not the last physical time the student was in attendance. If the student does withdraw and then wishes to return at a later stage to do a course of HE, they're going to have to start again with the application process and it will be considered as a new application.

So, we do know things happen. When you go in and you submit a withdrawal you think oh, I've done something wrong here, that student hasn't been drawn or somebody tells you two days later, actually that student didn't withdraw, I've told you in an error, you can submit a resumption COC on that point. We will then be able to resume that student's application. But once you do tell us a student's in turn has withdrawn from the course, we will recalculate that student's entitlement and we will let the student know that we've received notification from their HEP that they've withdrawn and we seeking seek immediate recovery of any overpaid maintenance and then any overpaid tuition fees, we will claw back from yourselves from future payments.

So, attendance management policy. Hopefully you've seen from today's very high-level overview of SIS and its functionality that the benefits of a good attendance management policy within your organisation will reduce overpayments for your students, will reduce any fraud that we may get at SLC.

So, a good attendance management policy is vital for each organisation, each HEP. Hopefully you will know if your organisation has an attendance management policy or something similar. You may not call it attendance management policy, you may call it something completely different. But it should clearly outline your own individual HEPs attendance management. It should include details on the cooling off period. So, the students should be quite clear in the fact that if you have a cooling off period of say two weeks, they withdraw in those two weeks, they are not going to be charged the tuition fee.

You should have a clear concise information on engagement and what's expected of the student in terms of their engagement and what will happen if they are deemed to be non-attendant. They're not engaging with their studies. It should also include details on what will happen if they withdraw or they decide to suspend or take a break in their course. It also gives a good clear attendance management policy, gives good guidance, clear understanding to both students, and also staff, academic staff especially who understand the implications of not informing you guys of when a student has decided to leave their course. So, it's vital that everybody within your own organisation is aware of your individual attendance management policy.

So, queries and guidance. We like to end a presentation at SLC with the bog standard, slide at the end to give you details of where you can get support, more guidance, because I have given you a very high-level overview of SIS and the functionality within it. So, for more information, as I say, the first port of call if you've got questions on SIS, CMS or the bursary service, please look at the HEP Services website, all the guidance is on there. You've got the partner support desk as well, colleagues are either on the phone or emails, please use them, but you do have to be a name contact on the HE gateway. Or finally, you can contact us, regional account managers. So, if you don't know who your account manager is, please go in on the HEP Services website. And you can find out which particular account manager, which one of our colleagues is responsible for your HEP. So, we are there available as well.

So that gives us nine minutes for questions. It was a lot of information for us to get through within that 60 minutes. So, I hope you have some good information to take back. So, what we're going to do, John is how do you want to do this? Shall we start with an audience question, John is the man with a roving mic? So, if you have a question, oh, straight up at the back, two at the back. That's what I like.

### **Male 1**

Just double checking, I think you've answered this for me, I just want to clarify for fee liability point three, asked for the vast majority of our students, the first date of term is, I believe, third of May.

### **Lucy Marwood**

Yeah, I know it's a really tight turnaround.

### **Male 1**

I don't think I'm going to get it done by the day.

**Lucy Marwood**

No. What I should have said, no don't panic. I don't want you to go have sleepless nights. What I should have said, if you don't feel you are going to be able to do your attendance management or take attendance confirmations at any time during the academic year, there may be stuff competences, they may be issues that you know, you may have been pulled away to do something that takes priority, just let your account manager know. I know this particular one is really tight because Easter is so late then we've gotten to the bank holiday and it's... So, if you don't feel you're going to be able to do your attendance for that 4th of May, please just get in contact with your account manager because otherwise, we just write email saying why haven't you done it? Why haven't you done it. So just, to stop us having to get in contact with you and you having to write an email, either lift up the phone, give us a ring or just drop us a quick line saying it's really tight, we're not going to be able to get them done, give a sort of timeframe of when you think you might be able to get them done. All right, thank you.

**Female 1**

So how long after you submit a COC will that then appear on the ACL?

**Lucy Marwood**

As I say, we do have SLA so the 20 working days off peak and the 30 working days whilst we're on peak. So if you use those as a generalized measure, but if you think you've submitted a COC, and you think this has taken an awful long time for a really, you know, easy withdrawal you thought was going to be kicked, done via the automated system, just check that hasn't been kicked out to manual. Because manual may also mean that the assessment in the first place had to be done manually. So that could be a reason why it was kicked out to the manual thing. So just keep an eye on it, and if there's anything that's taking longer than 30 days, email that address and say, can you just give me an update of when this is likely to be completed.

**Female 1**

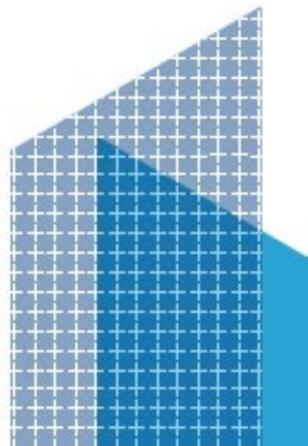
That's great, thank you.

**Jon Legg**

Any more questions in the room? Okay, we did have a few coming through online. Unfortunately, quite a few of them are about the live feed. I think it's been a few technical issues so, sorry about that.

**Lucy Marwood**

Apologies everybody out there.



**Jon Legg**

I'll just pick out a couple of random ones. So first one that came through was, is there some way we can find information about how we as service or doing against the guidelines which I think by that is meant service standards. Your first port of call there is your Account Manager. Account managers, we all have access to reams of information about all these different measures we have. So, if you talk to your account manager, they can provide information we can also do count reviews with you look in detail at all the service centres, all your data and talk you through that.

Okay, I'll just pick up another one. Yeah, got one for you, Lucy. Our COC administrators only have access to view and create COC but we'd like them to have access to view student information only as read only as we don't want them to accidentally confirm attendance or registration. Is there a way to give them a view of this page without them being able to make any changes?

**Lucy Marwood**

Yeah, your user administrator should be able to set them up with read only access to view it the student information. So, they should be able to, if you look at, again going to the guidance on the HEP services website, they have all the access roles detailed there and what levels of access will give your colleagues access to SIS. So, there should be just a read only functionality where they can go in and start checking if applications have come through and not be able to submit COCs attendance or reg. So yeah, that functionality should be available. Just have a look at the guidance and see what particularly user access roles they have to be set up under.

**Female 2**

In regards to the service levels, is it then that measured only for the UG full times or is that measurement actually done for each of the other...

**Lucy Marwood**

Majority of the service standards are for the full time undergraduate but we do have separate service standards for part time and also post grad. But I've concentrated because I'm afraid it was a bit of a broad sort of brief I was given on the full time undergraduate. If you want to look at the full document where it does give the service standards for everybody else, have a look on the HEP services website.

**Female 2**

Thank you.

**Lucy Marwood**

Have we got any more coming through online?

**Jon Legg**

Yes, we do have a few. Let me see. Okay, here's one. If we know a student is likely to withdraw, but is yet to confirm, is there a mechanism on the portal to prevent Tuition Fee Loan and Maintenance Loan being paid for next term and prevent clawback of Tuition Fee Loan and also maintenance loan payment for the student?

**Lucy Marwood**

Right, well this is very sort of tactical suspension, hold your horses, everybody it sounds exciting and tactical. Yeah, if you think of student has come to you and said, I'm not sure I'm going to come back next term, it's really vital for you guys to tell us as soon as possible. Because if it's the end of term, we don't want that next maintenance payment to go out to the student, we want to stop it so they don't get into debt and we don't go back in and say we want that money back. So, if you can use the suspension as a tactical way of stopping that maintenance payment going out, that would be really great. And then when the student has either confirmed I'm actually going to withdraw, you can do the withdrawal with the effective date, etc. of their say, I've actually decided, yes, I'm going to continue, you can submit a resumption and we can get all those payments sorted out. But it really is kind of vital at the end of the term, before we pay the next terms maintenance support for you to get those tactical suspensions through to us. And it's a really good way for us to stop the massive overpayments that we see to students who withdraw. It's heart-breaking that some of these students are put in such financial difficulty. So yeah, use suspensions tactically.

I think we've got time for a quick one.

**Jon Legg**

A quick one okay, I'm not sure if it's quick. Okay, can we use D codes on students who are resetting a year, not in attendance?

**Lucy Marwood**

That's a yes, you can do or you would just not register them. So, you could submit an N code. So basically, if they've not come back and not in attendance, yeah you can do that.

So, I'm going to stop there because we've got to be out of the room because they've got this set up for the next one at quarter past. Thanks, everybody joining us online. Apologies if there were some technical difficulties. If you want to get in contact with your account manager with any questions that we may not have covered, please do so. Guys who are in the room, lovely to see you. My first one back after two years, it's been great to do a presentation with lots of joyful, happy people in front of me.

If you've got questions which you've not covered or something you want to come and talk to us about, we're all at the hub. If you can see us gathering around those desks, please come and talk to us. We get a bit lonely. So do come and talk to us through the next couple of days. It's been really good to see you here today. So, enjoy the rest of the seminar. And off you go, go and get a cuppa before the next one. Thank you very much, thank you.



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