

Courses Management Service

User guide

V4

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Definitions

Term	Definition
APP	Access and participation plan
AY	Academic year
Characters	The number of letters contained in a field
CMS	Courses Management Service
CoC	Change of Circumstance
DfE	Department for Education
DfE NI	Department for Economy Northern Ireland
DL	Distance learning
Domicile	The country the students treat as their permanent home and from which they apply for funding
Education Authority (EA)	Replaced the Education Library Board (Northern Ireland)
Field	Components where information should be submitted, for example, course title
FT	Full-time
HECoS	Higher Education Classification of Subjects
HEFCW	High Education Funding Council for Wales
HEP	Higher education provider
OfS	Office for Students
PT	Part-time
QTS	Qualified teacher status
SAAS	Student Awards Agency Scotland
SFE	Student Finance England
SFNI	Student Finance Northern Ireland
SFW	Student Finance Wales
SIS	Student Information Service
SLC	Student Loans Company
TFL	Tuition Fee Loan
UCAS	Universities and Colleges Admission Service
UKPRN	UK provider reference number

The above definitions apply to all supporting material for the Courses Management Service which you can find on the Courses Management Service page of the HEP Services website:

<https://www.heinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Introduction

The Student Loans Company's (SLC) Courses Management Service (CMS), accessible via the HE Gateway, is a directory of:

- higher education providers (HEPs)
- their full and part-time course information for both undergraduate and postgraduate courses

Our student finance application systems use provider, location and course data from CMS to enable accurate assessments and payments of support.

CMS is a single, flexible, controlled service. It acts as a single repository of provider and course data that has been subjected to strong, security and anti-fraud measures.

The design principles we hold for CMS ensure that:

- there is a single point of entry for provider and course information
- students can easily find their course when they apply

We will call for course collection ahead of every academic year (AY). We will ask you to provide term dates and fee information for existing full-time and part-time undergraduate and postgraduate courses. We will ask you to provide any new full-time or part-time undergraduate and postgraduate course information as the academic year progresses.

The accuracy of course information within the service is critical as it is used for many purposes. It allows us to correctly assess student funding applications and to ensure that payments are accurate, paid on time and to the right location. It will allow you to maintain and manage a centralised log of your course and fee information.

It is your responsibility to ensure that the details we hold for all of your courses are correct and meet the relevant Student Support Regulations. This will ensure that students are assessed against the correct course details and, where applicable, our fee payments to you are accurate.

Towards the end of course collection, ahead of the application launch for students, we will perform validation checks on the courses you have submitted. We will tell you about any courses that do not meet guidance and will expect you to amend such courses ahead of student application launch.

If you have any operational queries about CMS, please contact our Partners Support Desk on 0300 100 0642 or email HEP_Services@slc.co.uk.

Accessing the Courses Management Service

Courses Management Service (CMS) is part of our HE Gateway services. You can find the link to the HE Gateway on our HEP Services website:

<https://www.heinfo.slc.co.uk>.

On your first time logging in, you will receive an activation email containing your username and initial password. Once you have entered these details you will then be prompted to create your own password. It is your responsibility to ensure that these details are not disclosed to anyone else. Once you have signed in, you will see a link to the **Courses Management Service** in the side menu bar of the **HE Gateway** homepage.

The system enables you to sign in to BAS, SIS, CMS or the HE Gateway (depending on what access you have and to what system) with a single username and password. This means that you can gain access without entering your credentials for every system and you can navigate via independent links or via the HE Gateway.

Each user should hold unique access details, as sharing user access is not permitted. It will be up to the HEP Courses User Administrator to determine what system roles are allocated to each member of staff. If you do not have access to CMS, your Courses User Administrator can create a user account for you.

Once you have signed into CMS, the screen will time out after an hour if there has been no activity (with an eight-hour maximum session). If the screen times out, we will ask you to re-enter your access details.

There is no restriction on the number of users who can be set up with access to CMS. This is entirely at your discretion.

The user access levels are as follows:

Course Advisor:

Read-only access to view the provider and course information in CMS

Course Administrator:

Administrative access to add locations and course information in CMS

Course User Administrator:

Access to set up or expire any number of other users with access to CMS

Users at new providers and alternative providers in Wales, Northern Ireland and Scotland will have read-only access by default for the first academic year and until they have completed mandatory training.

Provider information

Provider details

We've entered all your provider details for you. It is very important that this information is correct and we ask that you check this when you first sign into CMS.

If you notice that any of this information is incorrect please contact us at HEP_Services@slc.co.uk as you will be unable to amend this yourself.

Contact details

You can add an email address of a contact at your organisation. This will be visible to students who are unable to find their course when completing their application.

Students cannot proceed with their application unless it is linked to their course. Providing an email address will let them get in touch with you quickly if they need help at the application stage. It will also help to minimise delays and ensure that students are assessed for eligibility before the start of their course.

Academic year details

We will update your academic year specific information ahead of course collection. The details we update are:

Designation

This section indicates the domiciles that your courses can be designated for. You can only add courses for the domiciles shown on the provider page.

Your provider type or category of OfS registration (English providers only) affects the domiciles you are designated for. Please see the designation quick guide for further information on provider and course designation. You can find this on the HEP Services website:

<https://www.heinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Category

For English providers, this indicates their category of OfS registration:

- approved (fee cap) with an APP
- approved (fee cap) without an APP
- approved

For providers in Wales, Scotland and Northern Ireland the category indicates their funding status:

- authority-funded
- other publicly-funded
- private

Fee caps

The provider fee cap will be pre-populated depending on your domicile and will equal the maximum amount stated by OfS, HEFCW, DfE NI and SAAS. This cap is set for both full- and part-time courses.

When you enter fee information at course level, you will not be able to enter a fee rate higher than the fee cap in your provider details.

Locations

You can assign courses to any location that you have created for your organisation on the locations tab. If you are offering a course at two or more separate locations this can be reflected under one entry on CMS.

To assign a course to a location, you must create the location first.

There are three location types in CMS: **Campus**, **Franchise** and **Teacher Training School**.

Campus

A campus is a location that students attend for their studies. We would expect your first location to be your main site (or lead school if you are a School Direct ITT provider). All you need to enter for each campus is its name and postcode. The postcode determines the funding that the student receives (inside or outside of London).

Franchise

Franchise arrangements

A franchise is a location at another provider that is authorised to deliver your courses. When setting up a franchise provider, we will ask you to link your franchise provider to an existing provider on CMS. If you are unable to locate the provider on CMS please email HEP_Services@slc.co.uk.

If you have any courses franchised out to another provider, you should include these in your course return and use the franchised location. We are aware that some providers want these franchise colleges to receive the student's tuition fee, but the accrediting provider should always supply the course information. Therefore, the student will appear on the accrediting provider's attendance worklist in the Student Information Service (SIS). The fees can then be passed on to the franchised provider by an independent arrangement between the accrediting provider and the franchise location.

Validation arrangements

Validation arrangements differ from franchise arrangements. If a provider is delivering a course which is validated, rather than franchised, by another provider, the provider delivering the course must add it to CMS. The provider delivering the course will add the location where the student is studying, then assign this location to the course.

Teacher Training School

A Teacher Training School is a location used to deliver school-centred teacher training courses.

For more information on ITT (initial teacher training) providers and courses please see the relevant quick guide on the HEP Services website:

<https://www.heinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Creating a new course

When you select the **Add Course** button, you will be prompted to specify if the course you are adding has an undergraduate or postgraduate funding level.

If you select postgraduate funding level, you will be asked to determine if the course is to enable:

- SFE/SFW-domiciled students to apply for Postgraduate Master's Loan or Postgraduate Doctoral Loan products
- SFNI-domiciled students to apply for the Northern Ireland Postgraduate Tuition Fee Loan
- Scottish-domiciled students to apply for the SAAS Postgraduate Tuition Fee Loan

If your course is an accelerated course, you should indicate it at this stage. There is validation in place that will let you add the higher course fee on the **Course Details** screen. For more information on accelerated degrees and how to add them to CMS please see the quick guide on the HEP Services website:

<https://www.heinfo.slc.co.uk/hep-services/courses-management-service.aspx>

Validation is in place on the **Add Course** screen to ensure that the academic year you have selected determines what course types can be created for that year as per policy.

Courses that have been created in a previous academic year will automatically appear in any future academic year, ready to be saved. When you add a new course, the system will create a new SLC course code (or codes depending on number of course variants).

You can find a comprehensive list of the fields required when creating a new course in Appendix 1 of this document.

The following high-level guidance covers the most important fields that you will need to complete when you create a new undergraduate or postgraduate course on CMS. You can find more detailed information in the quick guides on the HEP Services website:

<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service.aspx>

Course name [mandatory field]

The course name can be up to 120 characters in length. It should always be the exact name of the course, as marketed in your prospectus or on your website. You should not enter any other information (such as study mode or a course attribute such as, Placement) as part of the course name. All these other attributes will be captured elsewhere when you create the course. Presenting the course name exactly as it is marketed will help your students apply for the correct course the first time.

Where you have courses that share the same course and UCAS code (for example courses that run with or without a sandwich or placement year), you should still include a unique identifier in the course title (for example, 'Business Studies with placement year'). This will assist your attendance return in SIS if you are using the file import.

For postgraduate doctoral courses, the course name should include a unique identifier such as the subject or faculty, for example, civil engineering. The course name should not be a generic doctoral course or the title of a student's thesis.

Qualification [mandatory field]

We have worked closely with the Department for Education (DfE) and the devolved authorities in Wales, Scotland and Northern Ireland to create a concise and comprehensive list of course qualifications. You can find this in the guidance section on the HEP Services website:

<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

The following qualifications remain in the undergraduate qualification drop-down list. These courses are not eligible for postgraduate loans because they still attract undergraduate funding:

- postgraduate ITT courses
- Master's of Architecture
- integrated master's
- English postgraduate healthcare courses

You can find more information in the guidance documents on the HEP Services website.

HEP codes [optional field]

We have provided ten non-mandatory alphanumeric fields that you can use to enter further course identifiers if needed. You can add to or change these at any point. You can also use these to tag and group courses by type, such as placement courses or fee variances. On the course search facility, you can filter by HEP code to help you group your courses in any way you choose.

Duration [mandatory field]**Undergraduate courses**

You can select a full-time undergraduate course with a duration of between one and 6 years. You also have the option to indicate if the course should contain a foundation year.

For part-time undergraduate courses you should enter the full-time equivalent duration of the part-time course. You can find more information on part-time course durations in the Part-time Undergraduate Courses Quick Guide :

<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Postgraduate master's courses

A full-time postgraduate master's course may only have a course duration of one or 2 years for SFE/SFW postgraduate courses. If you create a full-time SFE/SFW course with postgraduate funding level, the duration field will automatically default to one or 2 years.

A full-time and part-time postgraduate NI course can have a duration of one, 2 or 3 years. These durations will appear by default if you enter a postgraduate course for Northern Ireland-domiciled students.

A full-time postgraduate master's course for Scottish students can have a duration of one year for a PG Dip and one, or 2 years for research and taught master's. These durations will appear by default if you enter a postgraduate course for Scottish-domiciled students.

A part-time postgraduate master's course for SFE-domiciled students can have a duration of one or 2 years full-time equivalent, or 2 or 3 years fixed duration if there is no full-time equivalent course.

As of AY 2018/19 part-time postgraduate master's courses for SFW-domiciled students can have a duration of either 2, 3 or 4 years. Where a course has a full-time equivalent, you should enter the course duration as the duration of study and not the full-time equivalent duration. For example, where a one-year full-time equivalent course is studied over 2 years, you should enter a duration of 2 years.

A part-time postgraduate master's course for Scottish students can have a duration of 2, or 3 years for a PG Dip and 2, 3 or 4 years for research and taught master's. These durations will appear by default if you enter a postgraduate course for Scottish-domiciled students.

You can find more information on master's course durations in the Postgraduate Master's Quick Guide at the link below:
<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Postgraduate doctoral courses

Select a full-time and part-time postgraduate doctoral course with a duration of between 3 and 8 years.

Foundation years [mandatory field – undergraduate only]

Some full-time undergraduate courses are extended beyond their normal length to include a foundation year. The foundation year is designed to prepare entrants whose qualifications or experience are acceptable for entry to higher education, but not entirely appropriate for normal entry to their course of study in their chosen subject.

Students are eligible for funding if the foundation year is an integral part of the course, not a standalone course. The course needs to be designated by or under the regulations, with students enrolling for the full duration of the extended course at the outset.

If a student enrolls onto a four-year course with an integrated foundation year, and after that year transfers onto a course with a different course code, then the award authority is bound by the regulations to reassess the student's standard entitlement as if the student is transferring course. This means that once the student changes course, regardless of whether this is a chosen pathway, they would be using up their additional year of funding (sometimes referred to as a gift year or a +1). This can affect students if they have studied previously or they need to repeat a year in the future, unless the course they are transferring to also has a foundation year and the student is going into an advanced year.

In CMS you can create full-time undergraduate courses with a foundation year by selecting the **Add Foundation Year** checkbox within the **Course Duration** field. This will create a course with the selected duration but with a marked foundation year (year 0).

The foundation year is only applicable to full-time undergraduate courses.

Course credits [mandatory field for part-time undergraduate courses]

You must enter a value in the credits field of all your part-time undergraduate courses. Once you have entered this value, it will be included as part of the core course information. You will not need to amend this every academic year.

You should enter the total number of credits for the entire course, rather than the number of credits available by the course year. Until you have entered a value into this field you will not be able to save the part-time course.

It is important that you enter accurate course credits, as this has a significant effect on the students' entitlement.

You can find more information on part-time course durations via the link below:

<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Subject categories (HECoS) [mandatory field]

The subject is a generic classification. It does not indicate the level of study and is only meant to capture the subject of the course. We use the same list for courses at any level: undergraduate, postgraduate and continuing education programmes.

The structure of the subject category is based on the Higher Education Classification of Subjects (HECoS) coding system and is presented as a 6-digit code. HECoS is the subject classification system that describes the subject content of courses at UK higher education providers. HECoS was developed by the Higher Education Statistics Agency (HESA).

You can record up to 5 subject categories against a single course if needed. For example, a Bachelor's Degree in Geography and Mathematics would have two subject categories, one for geography and one for mathematics.

The subject category is a mandatory field for all undergraduate and postgraduate, full-time and part-time courses. We use this to determine which part-time courses are exempt from the Equivalent or Lower Qualification (ELQ) rule. You can find the full list of the courses eligible for part-time exemption in the guidance section on the HEP Services website:

<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

There is a link between the subject category you select and the healthcare-related course attributes. Only courses set up with a subject category of **Medicine**, **Dentistry** or **Subjects Allied to Medicine** can have one (or more) of the following healthcare attributes checked:

- Medicine/Dentistry
- NHS Bursary
- Paramedic course
- Dental Hygiene/Therapy

You can find more information on entering HECoS codes here:

<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Attributes [optional]

You can apply various specific attributes to courses in CMS. These will help us to ensure that students get the correct level of support during the application process. There is no limit on the number of attributes you can apply to a single course.

However, not all attributes are applicable to both undergraduate and postgraduate courses, this is detailed below.

You are responsible for ensuring the correct attributes have been added to a course. Course attributes can significantly affect a student's entitlement, so it is important to check you have added the correct attributes.

The course attributes are as follows:

- Medicine/Dentistry
- Pre-registration
- NHS Bursary
- Dental hygiene/therapy
- Paramedic course
- Operating Department Practice
- Distance Learning
- Placement/Sandwich courses
- Intercalated courses

You can find more detailed information on each course attribute in the course attributes quick guide here:

<https://www.heiinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Available Course Years [optional]

You can use the **Available Course Years** function to manage groups of student applications more effectively by determining if a particular year of a course should be visible to students applying online or not.

This function lets you phase in or phase out courses and gives greater flexibility than using the open/closed course status indicator.

The available course years can be edited at any time, although any changes you make can take up to four hours to filter through to our application system.

All courses are defaulted to all students. If you do not have administrative access to CMS, you should email any requests to use the **Available Course Years** function to HEP_Services@slc.co.uk. We will then administer on your behalf.

The **Available Course Years** function has no effect on students who have already applied or been approved for a course. It is simply a tool you can use to manage which course years the students can select when they apply. Similarly, there is no effect on downstream systems (change of circumstance / SIS) for students who are already approved on courses that you edit. Students who apply on paper will have their applications approved as usual even if the available course years have been amended to prevent applications – this function is for online applications only.

Undergraduate courses

The **Available Course Years** function is available for both full-time and part-time undergraduate courses. The three settings are as follows:

- **All Students**
- **Returners** (continuing students and repeaters)
- **No Students**

Where a course year has been set to **Returners** and an End On student applies, the student will be prevented from applying as End On students are classed as new students. In this instance you should amend the course year to **All Students** so that the End On student can apply. Once the student has applied, you should switch the course year back to **Returners**.

Postgraduate courses

The **Available Course Years** function is available for all full-time and part-time postgraduate courses. The two settings are as follows:

- **All Students**
- **No Students**

Due to the 'apply once' nature of postgraduate applications, you should set your courses to **No Students** rather than closing courses to ensure continuing students still get their funding. This also allows you to transfer students to the courses if needed.

Designation – undergraduate [mandatory field]

You should select countries of students that you want your course to be available to. Only students from the domiciles you have checked in CMS can view and apply for that course in our Customer Portal.

English providers

Providers registered with the OfS in the Approved (fee cap) category have their designation status for all domiciles automatically added. CMS will default to designate your courses in all domiciles. However, you do have the ability to change this at course level if you have courses only for students from a specific country.

Providers registered with the OfS in the Approved category have automatic designation for English students only. If you are an Approved provider and need designation for students domiciled in Scotland, Wales or Northern Ireland, you must be specifically designated by the appropriate domicile before eligible students can access student support.

Providers that were Alternative Providers in AY 2018/19, regardless of which category they are now registered in by the OfS, must have their courses specifically designated for Scottish students to access student support.

When you add courses, you will only be able to select the domiciles that your university or college has been designated for.

Scottish and NI providers

Authority-funded providers (often referred to as public providers) are providers that are maintained or assisted by recurrent grants out of public funds. Authority-funded (public) providers are automatically designated for all domiciles and CMS will default to designate courses as such. You can change this at course level if you have courses only for students from a specific country.

An Alternative Provider is a provider that:

- is not maintained or assisted by recurrent grants out of public funds
- does not receive any other form of direct annual public funding (for example, from a local authority, or the Secretary of State for Education)
- is not a further education college

Courses that are provided wholly or in part by an Alternative Provider fall outside the scope of any automatic designation under the regulations. These courses need to be specifically designated so that eligible students may access student support.

Welsh providers

From 1 August 2017, the automatic designation of full-time HE courses applies only to courses provided by 'recognised educational institutions'. A 'recognised educational institution' is currently defined as any of the following:

- a Welsh regulated institution i.e. an institution which has a fee and access plan approved by the Higher Education Funding Council for Wales (HEFCW) under Section 7 of the Higher Education (Wales) Act 2015 whilst that plan remains in force
- an English regulated institution i.e. an institution maintained or assisted by recurrent grants from the OfS
- an institution situated in Scotland or Northern Ireland that is maintained or assisted by recurrent grants out of public funds

Where an HE course is not automatically designated it will need to be specifically designated by HEFCW before students can apply for financial support from the Welsh Government. Such courses may be designated on a course-by-course basis by the Welsh Ministers.

Designation – postgraduate master's [mandatory field]

You should select countries of students that you want your course to be available to. Only students from the domiciles you have checked in CMS can view and apply for that course in our Customer Portal.

In AY 2016/17 only English-domiciled and EU students were eligible to apply for Postgraduate Master's Loans. When a user added a course with a funding level of

postgraduate master's in AY 2016/17 the domicile designation was defaulted to England only. There was no option for the user to amend this.

From AY 2017/18 English, Welsh and EU students are eligible to apply for Postgraduate Master's Loans. If you add a course with a funding level of postgraduate master's in AY 2017/18, the domicile designation is defaulted to England and Wales only. You can de-select either England or Wales but you cannot add any further domiciles. Once you save a course there is no option to add another domicile.

From AY 2017/18 NI-domiciled students are eligible to apply for the Northern Ireland Postgraduate Tuition Fee Loan and postgraduate courses can be set up in CMS specifically for NI students. These courses are defaulted to the NI domicile only.

From AY 2020/21 Scottish postgraduate courses can be set up in CMS specifically for Scottish students. These courses are defaulted to Scotland only.

Designation – postgraduate doctoral [mandatory field]

A Postgraduate Doctoral Loan will only be available from SFE and SFW for courses provided by UK HE providers with research degree awarding powers (R-DAPs). Only providers that have been granted research degree awarding powers can award doctoral degrees.

There are instances where a provider without R-DAPs (Provider A) may enter a validation arrangement with a provider with R-DAPs (Provider B). In these instances, Provider B approves a programme of study offered by Provider A which contributes to the award of a doctoral qualification from Provider B. In validation arrangements, the degree awarding body (Provider B) is ultimately responsible for the academic standards of any awards granted in its name, and for the quality of the learning programme.

If your doctoral courses are validated by a provider with R-DAPs, please contact your account manager or email hep_services@slc.co.uk to find out if your courses are eligible and how to add these courses to CMS.

For further information on eligible validation arrangements please follow the link below:

<https://www.heinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

From AY 2018/19 English and Welsh students are eligible to apply for a Postgraduate Doctoral Loan. When you add a course with a funding level of postgraduate doctorate, the domicile designation is defaulted to England and Wales only. You can de-select either England or Wales but you cannot add any further domiciles. Once you save a course there is no option to add another domicile.

Only students from the domiciles you have checked in CMS can view and apply for that course in our Customer Portal.

Fees [mandatory field]

Undergraduate

On the Provider page of CMS, you will see an AY-specific provider fee cap for both full-time and part-time courses. We administer this fee cap on your behalf. You cannot enter any course fees that exceed your provider fee cap. The only exception to this rule is for an accelerated degree. When you enter the fee for an accelerated degree, the validation in CMS will allow you to add a fee of up to 1.2 times your provider fee cap.

At course level you can enter different fee caps for each domicile to enable you to manage fee variants and caps. For example, Welsh and NI providers will be able to manage their separate fee structures for students from different domiciles within one course.

The system defaults to apply the same fee rates across all domiciles. You should untick this if you wish to put in a different fee amount for a particular domicile. You can also enter a course fee rate of zero for a particular year (this may be useful if you offer courses with a placement year).

You will only need to enter one fee rate for part-time courses regardless of the duration selected (although you can enter different fee rates for each domicile if the course is split over multiple domiciles).

With the introduction of the Teaching Excellence Framework (TEF) from AY 2017/18, providers that achieve TEF status can charge a higher fee amount than providers that do not achieve TEF status. It is at the discretion of each provider if the higher TEF fee amount is applied to all course years for all students, or just set to course year one for new students. (You can submit fee Change of Circumstance notifications for direct entry students who apply to a course year that has a fee amount lower than the provider fee cap.)

Postgraduate

As the Postgraduate Master's and Doctoral Loan products for SFE/SFW students are paid directly to the student, you do not need to enter the course fee rate in CMS. When you add a course with a postgraduate master's or doctorate funding level and select SFE/SFW, no course fee box appears on the course capture screen. You need to enter a tuition fee when setting up a course in CMS with Northern Ireland Tuition Fee Loan funding. When you set up this type of course, you will need to enter a fee rate per course year. This fee can be higher than the provider fee cap on the Provider page of CMS.

For Scottish postgraduate courses you need to enter a tuition fee when setting up a course in CMS. Where the course is more than one year in duration, you should split the course fees equally across each year of the course. This fee can be higher than the provider fee cap on the Provider page of CMS.

Term dates [mandatory field]

All undergraduate and postgraduate courses entered into CMS need three sets of term dates to pass system validation. For full-time undergraduate courses, postgraduate master's and doctoral courses, you should add term dates for all years. This means you can add variable term dates for each year where relevant.

Once you have entered all term dates for a new course and for all years (where relevant), you can add another intake of the course. This means that if you are creating a September start course, you can also enter a separate intake for the same course which starts later in the academic year (for example, in January). You cannot add an intake once a course has been saved so we recommend that you add all intakes before saving the course. You can create up to 12 intakes under a postgraduate course, one per month. For postgraduate doctoral courses, where you have multiple intakes in one month, you should choose a generic date in the month and add the course to CMS with one intake for that month.

You can amend the first intake month when saving in the new academic year. For example, if your course had a September intake in the previous academic year, you can amend this to October in the new academic year.

For full-time undergraduate courses, validation is in place to highlight that only courses with a compressed course year can have a term 3 start date before 1 April. No other undergraduate course should have a term 3 start date before 1 April. This is to prevent the scheduling of 3 lots of tuition fee payments within one financial year. You can find further information on compressed courses here: <https://www.heinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

In the years when a bank holiday falls at the beginning of April, the term 3 start date should be 3 April at the earliest. Our payment system schedules payments before the bank holiday which means that even if term 3 start date falls on 1 or 2 April, the payments will need to be processed in March.

It is your responsibility to ensure that the term dates you enter accurately reflect the teaching provided to students attending that course.

You can find more term date guidance here: <https://www.heinfo.slc.co.uk/hep-services/courses-management-service/guidance-further-information.aspx>

Updating course details for a new academic year

When you click on the **Courses** tab in CMS, the page will always default to the most recent AY. You can use the AY tabs to navigate to previous academic years.

Each new academic year, we will automatically populate your previous academic year's course catalogue into the new academic year. The courses will be presented as Unsaved and in a worklist format.

You will then need to open each individual course and check that the relevant term dates are populated and the course fee rate is correct. Once you have checked these details and made any necessary changes, you can save the course for the new academic year.

The course list will show two totals, the **Total Courses** and the number of **Unsaved Courses**. Once an individual course is saved, the Unsaved Courses total at the top of the course list will decrease to reflect the number of unsaved courses remaining.

To help you in the process of saving courses for the new AY, you can use the course search facility to filter on a specific subset of courses. This course search will persist so that you can work down a list of filtered courses, saving them individually and then returning to the previously selected filtered list of courses without having to enter a filter value again.

CMS has user preferences to help with term dates when saving courses for the next AY. User preferences work on a month-to-month match. When you roll over a course and its start month matches a start month of a previous course that you have saved, the course you are rolling over will be pre-populated with the date, month and year from your previously saved course.

If you are rolling over a course with a start month that does not match the start month of a previously saved course, CMS will pre-populate the months and years based on the course details from the previous year. The date fields will remain blank for you to complete.

If you have a course set up with multiple intakes, on rollover some intakes may have the term dates completely pre-populated if you have already saved a course with the same start month. However, you may need to enter the dates for some intakes if you have not yet saved a course with the same start month as that intake.

Before you save a course, you should always check that the date, month and years are accurate.

Course fee rates will always be defaulted to the provider fee cap. If a course has a placement attribute against a specific year, once a value is manually entered against this placement fee, the same value will automatically be used in all further courses that have the placement attribute. This placement value will persist until you manually amend it by overtyping. From this point onwards the updated placement fee will become the default value for all unsaved courses with a placement attribute.

Editing a course

You can edit a course that has already been added to CMS. If you need to amend an already saved course, please contact HEP_Services@slc.co.uk with the details as soon as you can.

You should only make course changes when necessary as we may need to reassess your students and their entitlement may be affected. It is with this in mind that we encourage right-first-time course submissions.

Undergraduate

By clicking on the **Edit** button next to the **Course Details** section of an already added course, you can amend:

- term dates (only where the change does not impact the year one start month)
- fee rates
- placement year
- course name
- UCAS code
- HEP codes
- intercalated course indicator

You can then either save or cancel your changes. If you make changes to courses already added to CMS, you will see a warning message to communicate these changes to our Partners Support Desk before you proceed.

Postgraduate

SFE/SFW

You can also edit saved SFE/SFW postgraduate master's and doctoral courses. By clicking on the **Edit** button next to the **Course Details** section of an already added course, you can amend:

- term dates (only where the change does not impact the year one start month)
- course name
- qualification (postgraduate master's only)
- UCAS code
- HEP codes

You can then either save or cancel your changes. If you make changes to courses already added to CMS, you will see a warning message to communicate these changes to our Partners Support Desk before you proceed.

SFNI and SAAS

You can also edit saved postgraduate master's courses for NI and Scottish students after the course has been added to CMS. By clicking on the **Edit** button next to the **Course Details** section of an already added course, you can amend:

- term dates (only where the change does not affect the year one start month)
- course name
- qualification (NI courses only)
- UCAS code
- HEP codes
- course fee

Course search and filter

You can search and filter your courses in any way that you choose. On the course listing screen, use the free-type search bar at the top of the screen to filter on any combination of the following areas:

Course Name	UCAS code	HEP code
Qualification	Foundation year courses	Placement year courses
Full-time/Part-	Unsaved courses	Postgraduate/Undergraduate
Mode of study	Duration	NHS Bursary courses
Distance	Intercalated courses	Medical and dental courses

Alternatively, searchable elements are listed in the **What Can I Search For** link underneath the search bar. You can click on each one to see the results of that search.

Export courses

You can export course information by clicking the **export** dropdown button on the courses listing page of CMS. You can export a specific academic year or all courses across all academic years. The export contains all fields at course and academic year level and is in csv file format.

Closing a course

If you wish to close one of your saved courses, you should ensure there are currently no students on this course. You should never close a course that has students accessing funding for it.

We would advise using the **Available Course Years** function (detailed on page 13) rather than closing a course.

Once you have confirmed there are no students on the course, you can close it by clicking on the **Close This Course** link on the **Course Details** page. You will then see a warning message asking you to confirm that you want to close the course.

DSA course

To allow students to access DSA support, you should continue to update your DSA course yourself. This should be treated in the same way as all other courses on CMS: enter the relevant fee, term date and location information and add the course. The format to use for the DSA undergraduate/postgraduate course is as follows:

Course Details –

Name of Course: DSA Designated Post Grad
Qualification: Postgraduate ITT with QTS

Duration: 1
UCAS Course Code: POST
HECOS Code: 101274 – General Studies
HEP Code: N/A
Location: Main campus

The campus location should be the primary location for your university or college. The course fee should be the provider fee cap. You should enter terms dates that reflect your most common term dates.

Appendix 1: Courses Management Service fields

Below is a comprehensive list of the data fields you will need to use when creating a course.

CMS screen / section	CMS field name	Note	Mandatory/optional
Add a course	Start Year	Dropdown selection. Choose the academic year you want to set the course up for.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Funding Level	Radio buttons. Choose the funding level of the course you are creating.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Study Mode	Radio buttons. Select full-time or part-time for the course you are creating.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Accelerated Courses	Select this if you are creating an accelerated course. Available for English providers only when creating a full-time undergraduate course.	Optional for undergraduate full-time courses.
	Domicile	For postgraduate master's courses the domicile of student the course is attracting should be selected.	Mandatory for postgraduate, full-time and part-time, courses.
	Postgraduate options	Radio buttons. Select Master's or Doctorate. Only available when postgraduate is selected with an England/Wales domicile.	Mandatory for postgraduate, full-time and part-time, courses with a domicile of England/Wales.

Add a course - Course Details	Course Name	Up to 120-character description of the course.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Qualification	Select the correct qualification from the dropdown list for the course you are entering.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Duration	Select the correct duration from the dropdown list for the course you are entering. For part-time courses, enter the full-time equivalent where relevant.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Foundation Year	Subcategory of the Duration field. This indicator can be set to show that the course has a foundation year.	Optional for full-time courses.
	Total Credits	Four digits can be entered. The total credit value for the full duration of the course should be entered.	Mandatory for part- time undergraduate.
	UCAS code	Universities and Colleges Admissions Service. 4-character alphanumeric reference assigned to a course.	Optional for full-time courses.
	HEP Course Code	Alphanumeric field for HEP's own internal course code. Up to 5 codes can be created.	Optional for full-time and part-time courses.

	Subject category (HECoS)	Higher Education Classification of Subjects (HECoS) coding system presented as a 6-digit numeric code. CMS will present HECoS codes that match the code being entered. You should select the correct code when displayed. Up to five subject categories can be recorded against a single course.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
Add a course – Course Details: Attributes	NHS Bursary	This indicator can be set to show that the course is applicable for an NHS Bursary. For full-time courses this indicator can be set against any number of years within the course.	Optional for undergraduate full-time and part-time courses.
	Distance Learning	Distance Learning is a method of attendance course attribute and should be selected when all students on the course are studying via distance learning.	Optional for undergraduate and postgraduate courses, full-time and part-time.
	Placement Year	Placement Year is a method of attendance course attribute. This allows the placement year to be flagged.	Optional for undergraduate full-time courses.
	Intercalated	This indicator can be set to show that the course is an intercalating course.	Optional for undergraduate full-time and part-time courses.
	Medicine/ Dentistry course	This indicator can be set to show that the course is a medical or dental course.	Optional for undergraduate full-time and part-time courses.

	Undergraduate entry	Subcategory of Medicine/Dentistry. This indicator can be set to show that the course is an undergraduate entry course.	Optional for undergraduate full-time and part-time courses.
	Graduate entry	Sub category of Medicine/Dentistry. This indicator can be set to show that the course is a graduate entry course.	Optional for undergraduate full-time and part-time courses.
	Paramedic	This indicator will be selected when the paramedic science HECoS code has been entered. This can be deselected if required.	Optional for undergraduate full-time and part-time courses.
	Operating Department Practice	This indicator will be selected when the Operating Department Practice science HECoS code has been entered. This can be deselected if required.	Optional for undergraduate part-time courses.
	Pre-registration	This indicator can be set to show that the course is a pre-registration course	Optional for undergraduate full-time and part-time courses.
	Dental Hygiene Therapy	This indicator can be set to show that the course is a dental hygiene/therapy course.	Optional for undergraduate full-time and part-time courses.
Add a course – Course Details	Locations	The same course can be entered with multiple locations. Location options must first be created on the locations tab.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.

	Available course years	Radio buttons. Will automatically default to All students. Use this function to manage individual student applications more effectively by determining if a particular year of a course should be visible to students applying online or not.	Optional for undergraduate full-time and part-time courses.
	Designation	Courses can be designated at domicile level - England, Northern Ireland, Scotland, Wales. This allows students domiciled in that country to attend this course.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Fees	<p>Only digits can be entered. For full-time courses the course fee charged per year should be entered. Only one course fee should be entered for a part-time course.</p> <p>Fees can be entered for each course year over all domiciles or expanded to make domicile specific changes.</p> <p>SLC will already have entered course fee caps against the provider. Fees up to this cap fee value can be entered.</p> <p>Only one course fee should be entered for a part-time course.</p>	Mandatory for undergraduate full-time and part-time courses and postgraduate courses for SFNI students.

	Term Dates	Only valid dates can be entered. Three terms are created for each year of a course. Each term is linked with a start and finish date combination. Term dates can be the same for all course years or changed for each year.	Mandatory for undergraduate and postgraduate courses, full-time and part-time.
	Add another intake	Course intakes can be added as required when creating a course. Once the course is saved you cannot add another intake. Only one intake can be created for each calendar month.	Optional for undergraduate and postgraduate courses, full-time and part-time.