

Bursary Administration Service

Transcript



Jim Kersse

Good afternoon, everybody. My name is Jim Kersse. I am the service manager within Partner Services who is responsible for the Bursary Administration Service. I am joined today by one of our illustrious higher education account managers, Anne, who some of you already may know. And if you don't, I'm sure by the end of the day you'll know who Anne is.

This masterclass has been specifically designed for all providers who use the Bursary Administration Service. However, there may be some who have joined us today who haven't used the Bursary Service, and this hopefully will give you a bit of a background as to what the service can and can't do for you. BAS is a very powerful and flexible tool designed to assist you with assessing and administering bursary payments, scholarships and any fee waivers that you may have.

For all service users, there's two options, a core and a full, and you can flick between the two each year. You don't have to sign a new contract with anything. Once you've signed the contract with us, you can use core and use full. What we would suggest, however, is if you do want to go from a full-service user to a core service user, you let your account manager know. Just kind of allows us to do a bit of forward planning in terms of our budgeting, more than anything else.

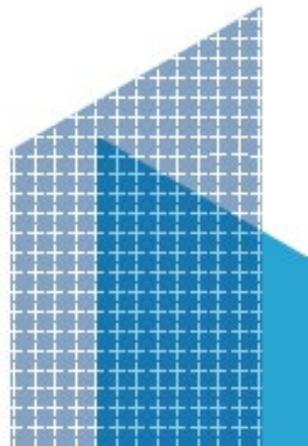
So hopefully, this masterclass will allow us a detailed overview of how to optimise your usage of the system, for those that use it, which will ultimately benefit your students. What we will touch on today and hopefully address some queries on are around, where does the data come from? What are the benefits of using auto versus manual awards? When should you set up your award rules? When should you approve them? Can you identify care leaver and estranged students? How do you customise any student correspondence that you may have, whether that be electronic or physical?

And what are the benefits of direct debit for invoice payment, other than it makes it a lot easier for us? So, this is kind of the agenda we'll cover over the course of the next hour or so. We'll provide some time at the end of the session to answer any questions you might have on what you've either seen or heard today. For those who are online, you can post a question at any time throughout the session and we'll pick those up at the end.

You don't have to wait till the end. What we would hope is to get a bit more interaction. For those that are in the room, if you hold your questions to the end. However, you can log them online if you want to, through your delegate area. And again, we'll answer those questions, hopefully get through them all. And if not, we'll set them to Anne. So, whatever is outstanding at the end of the event. So, what is the Bursary Administration Service?

Anne Thomson

When it was born!



Jim Kersse

We've paid out somewhere in the range of about £3.5 billion, which is not an insurmountable amount of money. So, as we said before, there are two service options. There's full service, which that subscription allows you to access the full service, which you can set up rules, set up payment profiles, make payments, automatic and manual awards, issue correspondence to your students or not, whichever you decide you want to do, customise your award letters with your logo and your content, submit award rules for approval and approve payments.

Ultimately, you will always have the final decision to approve any bursary funding in line with your predefined award rules. So, no matter what the system throws back for you with the rules you set up, you ultimately still decide who does and doesn't get paid. For some of you who will know, we draw down the funds from your account by direct debit ten days in advance of the student's payment date.

And we also provide, in addition to that student helpline, and also a provider helpline to actually respond to any bursary related queries that you may have. For the core service, if you prefer only to process the student finance information within your own systems, which you can do, you can still use BAS for reference to extract that information, and you get the same information as those who use the full service, but obviously you don't get access to the award rules. You can filter the data for both services to only pull-out information that you want to see or you can pull it all off.

As we said before, it's a contracted service, but it's a not-for-profit service. So, any additional money that we make... Any additional money? That sounds like we make a profit - we don't! Anything that we generate is invested back into the service for enhancements, although recently there hasn't been a lot of enhancements, but there are enhancements in the pipeline. Oversight of the Bursary Service is provided by a steering group.

The steering group currently meet about twice a year. But we're looking to extend that to four times a year. And what we're also hoping to have soon is the reconstitution of the user group. Now, Anne might know better, but there was a user group a number of years ago that for whatever reason just dissolved, disbanded. Whatever happened to it, nobody really knows.

So, we have had a list of providers nominated to sit on that user group and the invites to that user group are going out hopefully within the next few weeks, ahead of the forthcoming steering group. So, BAS gathers information from all student finance applications. Additionally, we can use attendance confirmation, as some of you will know, as a means of triggering student payments. The application information, including household income, is made available to you as soon as we have it, so that you can assess student awards.

Information for English, Welsh and Northern Irish students is automatically included. Scottish student information, although it's shown in the same format, comes through to us from SAAS. Normally once a week, I think, if I remember rightly. We previously... Up until recently, household income information from SAAS was limited to 34,000 and that was the maximum limit for Scottish funding.

However, that limit's now been removed. So, if we get the SAAS household information, it will be presented to you to make assessments of SAAS students for bursaries. With core and full-service options available, you decide what service you need and how you use it. So, as I said before, the information surfaced in Bursaries is received from multiple SLC sources, initially from the student's application and subsequently updated from SIS and CLASS.

All the systems are interdependent on each other with the information flow being bi-directional. So, although the information comes in, Bursaries will feed SIS, SIS will feed Bursaries, which is why those two systems are very, very heavily reliant on each other. As I said before, when the information is available to you in the system, you can then decide what you want to do with this information, set parameters for your awards.

And what we stress is that the information that you do get from Bursaries and extract from Bursaries, you maintain that within the guidelines set out in the data sharing agreement. So, the data sharing agreement is very explicit as to what the purpose of the information is and should only be used for that information. It should only be used for that purpose, sorry. So, what we can obviously do is create tailored, bespoke and ad hoc reports, either automated or manual.

So, this timeline here gives you really a quick overview of the process. It covers the main elements of each stage. However, obviously, before we make any payments to students, we draw down those funds from you. As you see, although the process is fairly linear, all awards do not have to be set up at the same time. However, we would suggest or we would prefer that that happens... avoids us having to do any reassessments. So, as we've identified, sometimes when you reassess a student, it can create an issue with cancelled payments, as we were discussing earlier on with our colleagues from Warwick.

So ideally, all set up at the one time. Now, the process says once you set your auto awards up, you inform your account manager that they have been set up and Anne and the team will go and review these awards, either approve them, pass them back to you, depending on the status of the actual award. What we're looking at going forward and hopefully not too distant future is that the system will automatically email the account managers to let them know that the awards are there so they can pick them up.

Because these guys, as I'm sure you can appreciate, don't just look after Bursaries, they look after a lot of the other products that we have and hopefully this new communication method will allow them to be able to react as and when you guys set your awards up. So, a lot of providers set the rules up early in the academic year, so it allows them to see what they've got, when they're going to pay it.

However, there's no strict criteria for when these rules are created or approved. That's entirely up to you, when you approve your awards. You obviously make payments throughout the year based on the profiles that you have set up, in what was seen as kind of a move towards a later payment of some of the bursaries to really capture students' either success, academic success, or the fact that they've just completed some of the course.

So, we're kind of seeing a shift, as we've just said there. Also, it depends on what kind of... the expectations of your students. So, if you've told the student that they are going to get an award and they haven't been given a letter or you haven't approved the award, it may create extra issues in terms of communication with us. So, if you have indicated there's an award coming but you haven't approved it, they haven't had the communication, they tend to come back to us to ask, "Where's the money?"

But that's driven by you. So, it's your money. You decide when you want to pay it. So, this graphic here gives you a good idea of the actual student journey through Bursaries. Whilst we roll over provider subscriptions prior to the undergraduate full-time application process opening, so around about January time. If you're a current active subscriber to Bursaries, we will roll, in what's called the HE Gateway, your subscription over.

What that allows us to do is, as soon as the student applications come into the system, they're held waiting for us to open up the Bursary portal for you. Now, the Bursary portal is only opened at the point you pay your annual subscription invoice. So, we issue the invoice to you in March and you're supposed to pay it by the end of April. But as soon as you pay that invoice, we open that up for you and then your students will start to flow through.

And then you'll see what students and how many students have made applications. So, the sooner you pay your invoice... Not that it's on track to pay, we appreciate, already! As soon as you pay your invoice, your students will start to appear on your system. And added to that, again, it's the thing about where you set your rules up. So as the students come through the system, if you've set rules up, they will be assessed as they come through the system. That again speeds up the process.

Although we do allow the fact that you can reassess students at any point, any time. After approving an award, the system will send correspondence, either electronically or physically to the student and inform them on headed paper what they've been awarded and when to expect payment. The system will then schedule these payments in line with whatever profile you've set up, once, twice, three, ten times, depending on however you want to pay it. In the case of fee waivers, if you set up any fee waivers, it will generate a fee waiver CoC overnight, and that would be activated in SIS the next day, normally.

What we're trying to do is, there still are a number of providers who are using paper in terms of actually physically posting out letters to students. And there are some reasons why they do it. I mean, it's absolutely up to you to decide which way you want to do it. We will hopefully be trying to encourage you soon to switch over to email. One of the biggest sticking issues we've had with the emails, we haven't been able to incorporate the provider logo in the email. It comes out branded effectively as an SLC or it looks like an SLC email.

So hopefully we'll have, soon, the email set up so that it has your logo and it will look exactly like your letters that go out. Still directing the student to their online account. In addition to those UK domiciled students, household income can still be gathered for EU domiciled students. That's dropping off significantly, as you would expect. I think last year we were down to about 500 assessments that were carried out.

This is a separate contract that's set up to the general Bursary contract and gives you the opportunity to have your EU domiciled students contacted to provide evidence of their HHI. There are two options available through that contract to you. You can have all of your students assessed or you can nominate students who you would like to have assessed. But as I say, the system's dropping off now. It's certainly not used in the volumes it was in the past.

And what we see here is a graphic representing this process we follow for the EU students. They're assessed like any other student. But once they are on the system, once we have their HHI, EU rules will determine whether they do or don't get any kind of bursary award. You don't have to set up separate bursary awards for these if you don't want to. You can also exclude your EU students.

However, what we would note, and it should be noted for all, is that if the student doesn't have a UK bank account, we cannot make a payment to it. To any account that's not in the UK. So, accessing Bursaries. How do you gain access to Bursaries? Before being able to access Bursaries, you need to subscribe to the service by completing the standard Bursary contract, as I mentioned earlier on. This contract outlines the service provision and both the responsibilities of you as a user, us as the provider.

It covers legal requirements, and just as importantly, as we said before, how we both should comply with GDPR in managing that data. As you see here, those of you who log into the system, it's not any different. Whether you log into SIS, whether you log into CMS or whether you use Bursaries just now, you log in the same way.

So, anybody who doesn't use Bursaries just now, once your subscription's active, you will have access to Bursaries. As you'll see here from the menu, logging into the gateway, it'll just look exactly the same as that. Obviously, Bursaries is highlighted as a separate product on the screen. Also, if you need to add new users, those who are set up as the main system administrator can do this through the user administration area.

So, generating awards. As we said before, an award can be generated at any point in time. Obviously, for those that are made earlier in the academic year, they should be set up as soon as practicable. The awards that are generated after the initial award, they will still take place at a period of time to sign off, for any payments to be made to your students, which effectively is a ten-day rule. So, if you make an immediate payment now, it won't pay it immediately. It will still take ten days to pay it. It's a bit of a misnomer.

But everybody knows about the ten... Well, most people know about the ten-day rule. Yeah, and we're stuck with that just now, although we are kind of looking to see if we can move away from it. But unfortunately, we are still stuck with that. As I say, for fee waivers, these can be actioned immediately, overnight with automatic CoCs. And so, these are then submitted to SIS, for updating on SIS. Although as we said earlier on, awards that are paid later in the year can be set up... Our rule of thumb is, the earlier the better.

It's all about efficiency of the system. So, the later you leave it, the reassessment has to take place and the longer it takes to process that. And we can give a couple of examples. But in terms of the number of calculations the system's making, just for certain things, and because one of the issues that comes out routinely from our stakeholder feedback is that the system at times can be really slow. For some, it can be really slow all the time. But for some people, it can be really slow at certain times.

And I'll explain why that happens. Likewise, when you've approved the award, the student correspondence will be issued at that point. So up to the point of you approving an award, the student won't know unless you've told them that they're going to get an award. But as soon as you do, and if your correspondence is active, the letter or email, depending on which system you use, will go to the student. So again, what we said there before is you decide when the student receive their money.

Sorry, when the students receive their money. So, it could be at the beginning of the student's course. It could be at the end of the second term, end of the third term, a specific date. Or as we kind of said before, immediate. Obviously, the less restrictive the payment trigger is, the more you have to manage payment. So, some providers use no trigger as a payment. So, if your students drop off, you need to then make sure that those kind of subsequent payments, you cancel the award, so the student doesn't get any subsequent payments.

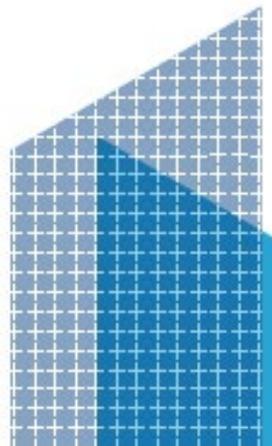
And never forget the ten-day rule. Once it's in that ten days, it's very difficult for us, in fact, nigh on impossible for us to stop that payment. As we said before, you decide when the student is paid. It's important that, so as not to impact on a payment date, that weekends and bank holidays are avoided. Obviously, if you put the weekend, it invariably pays it...

Anne Thomson

The Monday.

Jim Kersse

the Monday. So, it pays it later. And a bank holiday, it pays it... earlier?
Is it earlier?



Anne Thomson

No, I think it's actually later as well.

Jim Kersse

It is later as well. So, I know for some parts, the bank holiday brings it forward. But Bursaries, I think, it is consistent in that it pays it later. But your correspondence kind of gives a bit of flexibility and it says you will be paid normally within X number of days of the payment date.

Anne Thomson

And also, when we check, as account managers, when we check your rules, I've always got my calendar up just to check it's not a...

Because sometimes, some people don't change their profiles, they keep the same profile. And OK, maybe it was a Friday when it was, like, 19-20, but when it's a weekend... So, things like that, we should be able to pick up when we are actually reviewing your rewards.

Jim Kersse

Yeah. So that's very important, kind of checking that. One of the checks that the account managers go through. So up to 12 instalments can be profiled. Most providers, it's only one, two or three. However, for some of the teacher training, you're paid over a ten-month period, but you can pay up to 12 instalments and the distribution percentage is yours. So, it doesn't have to be ten tens. It can be, you know, whatever way you want to pay the student, you know, you could pay 25, 25, 50.

It really is up to you how you want the student funds to be released to them. However, fee waivers are slightly different, in that you only have one instalment set up and it's set up at 100% with no trigger. That allows the system then to kind of generate that automatic CoC. Again, as we said, payments can be indicated as immediate payments. But again, be aware, that's the ten days, it's not immediate today, it's today plus ten.

Obviously, the less restricted the profile, as we said before, the more you have to manage the student payments. So, as we said earlier, there are two types of award that you can set up in the system. There's automated awards, which you set up the criteria and the system will automatically assess all of your students against this criteria for you then to approve, should the student meet that criteria.

Now, the more rules you have, every single student gets assessed against every single one of your automated rules. And I'll go into a bit more detail around, as we mentioned earlier, about the calculations that it involves.

Manual, again, you decide which students you want to pick, based on the criteria that you set, whatever that criteria might be, and then the system will manage it thereafter once you have made that approval.

So, the process for setting up award rules, for those who have done it, it's fairly straightforward in terms of setting them up. But that really is driven by how complex you want to make the criteria. What should be said is that only administrators actually have the rights to set these awards up. And as I mentioned previously just there, these automated rules need to be reviewed by your account manager before they're signed off, to allow you to then subsequently activate them.

So, although the account manager approves the award, you then have the control thereafter of activating that award and then approving any applications that come in after it. Once the award has been activated, you can't edit it anymore. It's kind of set-in stone. Although you can't terminate it.

So, these are some of the criteria that you can use when generating automated awards. Additionally, for manual awards, again, as we said before, these are driven by your decisions around what you want to do, and there's kind of some examples of manual award rules that are set up, or the reasons behind why some of the manual awards are set up. The account manager doesn't review your manual awards, because there's really nothing in there that allows them to review them.

Although we are kind of monitoring each year how many awards you're setting up manually and how many you're setting up automated, and looking to see if there are ways that we could help with those that are set up as manual awards, that could maybe be transferred onto an automated award process. Obviously, manual awards can provide you with the flexibility to target your students, whoever they may be.

So, as you can see here, there's 30 criteria... I don't know how clear that is....that you can use when generating awards. Now, thankfully, I haven't seen anybody using all 30 criteria. But what we've kind of identified, I suppose, over time is that we need to kind of add additional pieces of information in here. Also, what we're looking at is making these functions a bit more dynamic, in that sometimes you can only select one option.

So, if that one option really doesn't help, maybe you want to select two options. So, we are looking at how we can maybe make that a bit better. For independent students here... So, the independent reason currently is limited to four options, from recollection - over 25 care leaver, under 25 self-funding, and something else...

Anne Thomson

Other? Does it not just say "other"?

Jim Kersse

I think "other" is the fifth one. However, what will hopefully soon have is, we will be able to surface estranged in these reasons as well. So, if a student has been identified as an estranged student, we will be able to allow you to pull these out separately. So hopefully, that adds to the dataset that is available to you. And it's certainly something that's been asked for...

Anne Thomson

When is that going to happen, do you know? I mean, is it soon, or is it...?

Jim Kersse

It's soonish! We've jumped through all the legal hurdles, so we've had to get legal sign-off on it. We've had our data protection sign-off on it. So now we just need to schedule slots in the tech group to allow them to make the slight changes to the system to allow this to happen.

Anne Thomson

Yeah, because it was for data protection in that third week. So that's how they've had to go through legally. But just now, as Jim said, you've got the other options, and usually you're just down to "other", then you're virtually saying that's your estranged students. But I think we're wanting to make it more...

Jim Kersse

Yeah, what we've got, as Anne said there, in the other category, what's left is deemed as estranged and vulnerable students. However, there are some categories that legally we're not allowed, or legally we can't get sign-off to surface those. However, once we've surfaced estranged, whatever's left are your vulnerable students, effectively.

So, something maybe to keep in mind. Although we can't say that, in terms of documentation that we will produce. So, what we're going to do now is, over the next couple of slides, is have a look at some rules that have been set up in the system and how those rules that have been set up could be modified slightly to make the system a lot more efficient.

So, what we can see here are...is the calculated method's been set up as multi-band. So, from the multi-band, there is only one band. So therefore, it's not really a multi-band. Because there is only one band. But to be fair, some of these, and I kind of take cognizance of this, is that some of these rules have grown up over time or shrunk over time, but they've just been left because they work.

So sometimes, for some, it's easier to leave it and not bother changing it than actually make it more efficient. So, we'll see here. This is a multi-band set-up, zero to... I can't see that far. Zero to 30,000, and a payment of £700. So basically, anybody's household income that is under £30,000 would get a payment of £700.

So, if this was just set up, should be set up as a set amount for £700. There's no need to put a multi-band on there because there is only one band. And then in the rules below it, you could set household income as less than or equal to £30,000. So, a real change in the way that we set it up to start to improve the efficiency of the whole process.

So, this is a rule that actually exists on the system just now. Again, as we said, these grow up from something else and are never edited in a way that would remove a lot of.... what would appear to be complexity, and there is no complexity in this rule whatsoever. And we'll go through it, to kind of show you. So, this looks complex. There's 19 separate rules.

However, when you break down the constituent parts of this, the complexity is driven by criteria that doesn't need to be explicitly called out here. And I'll break this down into four parts to explain it. So, if we take this kind of rule here, the provider who completed this award has, say, circa 20,000 students, OK, in the system. For this award roll-out, the system would carry out over 350,000 calculations just to go through this award for those 20,000 students.

This particular provider has more. But if they had only, say, four or five awards, it could generate near enough two million calculations because of the complexity of this particular award. So, if we take the first section here. So, we've got here, we've got the tuition fee set equalling the maximum full-time tuition fee of 9,250. Fairly straightforward.

But what we've then included in this is, is there a requirement for these two sections here, do we need to know method of attendance? Do we need to exclude method of attendance? If the fees are set at 9,250, it will only be a full-time course. It won't be a part time course. So, then you kind of start to look at it all going, well, can I make this better? How can I make this better? I can take those two out. So those two calculations, gone already.

So, coming onto the second section. So, the second section here is, if I remember rightly, commencing year of study. So, commencing year of study as being....17, 18, 19, 20, 21, five separate lines. So, if we were to use in the comparator... So, with the comparator there as it is, if we use the comparator "in", as opposed to "is", that allows us then to do it this way.

So, we've got 17, 18, 19, 20, 21. So we include the years 17, 18, 19, 20, 21. So from five, we go back down to one. The next part, here. It's completely irrelevant, because in the previous section what we've said is we want to see 17, 18, 19, 20, 21.

But what we're now seeing here is we don't want to see 12, 13, 14, 15, 16. Well, we know we don't want to see them because we've just said in the previous section, we only want to see 17, 18, 19, 20, 21. So if you look at the complexity that's been set up around this, it would have been set up previously and this is what we say about it growing...

Anne Thomson

It's historical, like...

Jim Kerrse

It just gets an extra line every year. And so, one line moves from one to the next, so it doesn't really need that. So again, that becomes irrelevant because we're not looking for that anymore.

We'll come down to the last section here. So, the last section here is the provider only wants to see the students who are in year five. They've made that clear in the very first line. They then went on to say, well, I don't want to see students that are in foundation year, one, two, three or four. But we know that because you said you only want to see the fifth-year students. So again, we have another extra five lines of complexity built into the rule that doesn't need to be there.

And again, as we said at the beginning, that can generate, for that one rule alone, in the region of about, what was it, 350,000 calculations? So, as we said there, because they've called out its year five, the other criteria become irrelevant. So, that's what the rule looked like to start with. So, we take all of that out because it doesn't need to be there.

So, we've reduced there 16 lines or something. And that's what the rule would now look like. So, we go from that to that. And having to maintain there to there, to now only having to maintain this. Now, that's not to say the 19 rules is wrong, because it's not wrong. It will still give you the same answer. But to get there will take you a lot longer.

So, if we said, if you remember I said at the start, it was 350,000 calculations to do the full one, to do the new one would be somewhere about 30,000 calculations for a 20,000 student cohort. That's 90% less calculations than you did with the first one. So, this is why when you're generating awards, you think... I'm maybe a bit old school. I like to write out things first before I do them. Right?

And sometimes it's better to do that, so you kind of look through what it is you're actually trying to achieve. Because if you take a step back from it, and this is what I did, was, well, why are they looking for all of these, to exclude all of these things that they've already said they don't want to include? So, it's about being critical as well. So, the system can work for you. But the more you ask it to do, the more work it's having to do for you unnecessarily. And to come back to where we said the system can run really slow at times - well, if we have rules set up like this, that's why it runs a bit slower sometimes.

I'm not saying everybody does that, but it's a really good example of a bad example. So, moving on. At the moment, you can use the copy function to copy a rule over from one year to the next year and this will be copied over as it stands, and it allows you to edit those rules, delete parts of it you don't want to do use any more, update your payment profile, as Anne said there, checking the dates.

Going forward, what we are hoping to introduce, again, I say soonish, because other things drive how much we can change, for those of you who use CMS and are used to the annual rollover of your courses, this is going to happen here too. So, the awards will be automatically rolled over for you in the same format as they were before.

But what we're also adding is a delete function. So currently, if you set a rule up, there is nothing there to allow you to delete a rule if you've made a mistake or you don't want to use it anymore. So, we'll have a delete function, and the delete function will work in the same way as it does within CMS, it goes away and checks to see if there is any student approved against a particular rule that you're trying to delete. And if it does, it won't allow you to delete that rule. So, they're the kind of things that we're doing to try to make the system a bit better, hopefully a bit more flexible for you.

And it will roll over both automated and manual awards, so it will roll them both over. The use of the "and" or "or" criteria. I have to hold my hands up sometimes, I never know when it's "and" or when it's "or", because sometimes you ask it an "or" which you think is the right thing you've asked, and it gives you all the wrong answers. So, I think if we work on the principle that "and" includes stuff that you want to see and "or" excludes stuff that you don't want to see.

And also, it's important that when creating fee waivers, this is kind of highlighted there, that you follow those rules. And not many people use the system any more for fee waivers in the same way as it was used, probably, previously. So, best practice - obviously, going back to the slide a couple of slides ago, best practice is, check your awards first, make sure that you've included or excluded everything that you want to include or exclude.

Check your, as Anne said, your payment triggers when copying over to make sure they don't fall on the bank holiday weekends, although the account managers will do that as well. But that's the belt and braces. Also, follow guidance on setting up rules, as in the online user guidance, and it should be supported by an account manager. What we are looking at, because we don't have it just now, is a more formalised Bursary training programme.

So later this year, we're hoping to have started that process, because obviously we appreciate that some people inherit a rule and then just inherit, inherit that 19 row rule and it just keeps going. So, what we want to do is make it obviously better for everybody. The process for signing off the awards is relatively straightforward. As most of the system is.

The rule is created and submitted for review. The account manager will review it, either approve it or send it back to you for updating, if it needs to be updated, in the nicest possible way. And then, on approval, it's your responsibility then to make sure that award is then activated. And then, after that, it's up to you to approve the students that are then thrown against that. So, a little bit about part-time.

The system is exclusively for undergraduate funding, it doesn't cover postgraduate funding. But it's not exclusive to full-time undergraduates. So, it covers part-time. The process is exactly the same for part-time as it is for full-time in terms of setting up awards and saving awards, approving awards. It's all driven by you. So, correspondence. Again, just kind of an outline on the correspondence. Once you've approved the award, the correspondence will be issued to the students.

But you have the choice to use the correspondence or not use the correspondence. There are some providers who prefer not to use the correspondence, and they issue their own correspondence around, you know, probably many other things, as well as the bursary being kind of one part of that. But if you do use correspondence, the system generates the letter or the email, the email directs the student to their online account, so it gives them a link to their online account, and then, a PDF version of the letter sits on their account so they can see the letter that they would have got if it had been sent out by post.

Our recommendation is that you use email. It's probably the most... We have all of the students' email addresses, as you would expect. Their address should be up to date. But there is no guarantee that the letter will get to the student in the time, whereas email obviously normally gets there instantly.

And as I said before, currently we are finishing off an enhancement to the email correspondence to allow your logo to be added to that correspondence, and not just SLC branded. Most of the letter... sorry, of the correspondence can be tailored to your own... to incorporate your own text. So, there are paragraphs...

Excuse me. I can't remember the maximum number of characters, but it allows you to insert your own paragraph at the beginning and at the end of most of the letters, with the exception, I think, of the failed payment, and the failed payment actually is a letter that goes out via letter, by us to the student, so it's the only one you can't do anything about. So, we move onto the next stage, which is about approving awards.

So, when your students have been processed through the awards algorithm, however complex or easy that happens to be, those who meet the rules and criteria set up will be presented to you in your approvals list, to then allow you that final decision on who does and doesn't get awards. As you can see on the screen, you should always ensure your customised text is up to date before you sign off your rules... Sorry, before you approve your rules, because once it's approved, the letter's gone, or the correspondence that relates to that is gone. So as long as you set it up beforehand. It's normally once a year...

Anne Thomson

I think what a lot of people use it for is they will say, "We're happy to say that you are now being awarded this bursary for academic year," say, "21-22," and then they'll maybe have a bit at the bottom saying, "If you have any queries, you can call our bursary team," on such and such.

So it's just if you have made reference to an academic year, and things then... So, you just make sure that you change it before you approve your awards, let's say for 22-23. So that's just to give you an example.

Jim Kersse

Yeah. So, and then, from the approval list, for those who use approval lists, you can reject or cancel your awards, for those applications that have been withdrawn, cancelled or deleted. And if there's any that are left at the end that you're not going to approve, our advice is that you reject those awards.

The reason being, if a reassessment occurs, rejected awards don't ordinarily get re-presented. However, cancelled do. And you may miss something or you may approve something that you really don't want to approve. So, finance and reporting. This is obviously the outputs that come from the system.

I will hold my hands up, they're not the greatest reports that you will ever get, but that's something we're looking at to enhance going forward. We've got a bid in to make some radical changes to the system. But that's not going to happen in the near future. But one of the things is that the reporting element of it to be a bit more flexible. And we'll go through some of these just now. So, as we kind of touched on, the ten-day rule. So, stick to that ten-day rule.

And use this when you are generating some of your reports, just remember that ten-day rule. So, some of the important factors to be considered, once that ten-day drawdown has started, as we said, it's very unlikely we'll be able to stop the payment. Therefore, it's vital you check that only those students you want to pay are being paid.

Within the contract that we have, it's very clear that the responsibility for payment lies with us, but the responsibility for approving that payment lies with you, and if we pay somebody that you didn't want to pay but you never told us you didn't want to pay them, it's up to you to then try to get that money back. To be honest, it doesn't happen very often, but it can happen. But again, it's up to you. Also, if we can't draw down any funds from you, so obviously, direct debit at the start of the ten days, we start to collect the money from you, we won't be able to pay your students.

Now, there have been incidences in the past where students have been paid but we haven't received the money.

Anne Thomson

Finance do their best to alert you, if it's flagged to them, they contact you, you know, just to say, can you do a bank transfer over? But, yeah, that's what the reports... So, when you know when you're going to make your payment, then it's just ensuring that your financier, they've got enough, you have money in your bank to pay them.

Jim Kersse

Yeah. So, annual subscription and invoicing process. I kind of touched on it earlier on. Obviously, to subscribe to the service, you must agree to complete a GDPR compliant contract, which clearly outlines both yours and our responsibilities, not just in managing the data, but how you will actually use the system. Each year, normally in March, we will issue you with an invoice for the service usage covering the period 1st of March to 29th of February for the current academic year and the two previous.

We don't go any further back than that because it's more effort than it's worth, to be perfectly honest. This charge includes the number of applications processed and the number of approvals made in this period. As we said before, our preferred method of payment for this is direct debit, because it's less administratively burdensome for us. But obviously, people can pay by BACS, and then most providers require a purchase order number and a BACS payment.

So, I'll kind of touch on... These are some of the reports that are available to you once we've started through the process. So, the menu screen doesn't look like this, I've just put it in this format so we could get the whole thing on the screen. So, the ones that are highlighted in blue are ones that you can't access. Some of you might see the report, but it doesn't allow you to actually run it.

So, the funding report, which is probably one of the main reports, is only available once the drawdown process has begun. This option allows you to create a report showing your payment instalments and a collection run and a total payment requested by SLC correct as at close of business the night before. The report can be output in PDF and Excel formats. Obviously, when you get it in Excel, it doesn't look as... I was going to say nice and pretty, it's not even nice and pretty, but anyway, it doesn't look the same as that, but it allows you to manipulate it, to kind of do whatever you want to do with it.

You set the parameters around the dates, the time, it'll tell you which bank the money is coming out from. There are subsequent pages to this report, which provides you with all the details of all the student payments. So, it'll list each student, if you've run the report, you'll see what it does. It lists every single student, when the payment was done, if it failed, why it failed, if it's been.

If we went to collect the money, and the money hasn't come for whatever reason, when we then went back to collect it again, and then if we've collected money that subsequently the award has been cancelled, as I say, it doesn't happen very often, it will show you the offset of that in the next payment run that we're taking from you..

Again, it includes details up to the close of business the previous day. You should be running this report to find out when we are going to take the money from you and what date the payment will be. So, this is kind of a good marker for you to check when we're coming for the money, to make sure the money is there. Again, the kind of parameters that are set up on this report are very similar to them all - you'll set the date from the date to an academic year.

And then your output will show you the bank that we're taking the money from. Each of the sections are pretty self-explanatory. If we look at approved, it's a maximum forecast drawdown total. This is the kind of stuff that's pending. And how many students are involved in that. Across to the far end, which is the paid and in progress stuff. It'll give you what was taken out for that particular award and how many students have been impacted by it. Sorry, have been paid from it.

Again, it comes out in the Excel format and the PDF format, with the caveat that the Excel format is not as pretty as this, but it's more manipulative... manipulatable? Anyway, you can fiddle about with it to your heart's content.

Anne Thomson

That's the technical term! Fiddle about.

Jim Kersse

So, outstanding payment trigger reports. So, these are the students whose payment trigger is outstanding, if there has been things like bank details missing and they have prevented payment from being made. So, it will list each student, the date the drawdown started, the date the approval was made, the payment amount and what is outstanding.

So, you can see there, these four are outstanding because the full-time attendance confirmation hasn't been put in. Or it hasn't come through, I should say. If it was bank details, it would indicate in there that the bank details were missing. Next one is the pending payment report. Similar to the previous one. It's only available once the drawdown process has begun.

Anne Thomson

The one before it is, you can actually see weeks before what's not... If a student is going to be on that pending payment report, because we used to just have that pending payment report, so we didn't know until the student never got paid that maybe they hadn't met the trigger, so that other report gives you it and you can sort of forecast... I don't know if it is 90 days, or a certain number of days, 90 days or something before it. So, you can check and see if you've got any students at pending. Because when you only had that report, you just knew on drawdown that the student didn't get paid.

Jim Kersse

Yeah. So obviously, the more active you are using the previous report, then the less, in theory, should appear on this report. That being said, there are still times when somebody will have a pending payment for a reason that doesn't appear so obvious, although the reason stated is obvious, but it's not always that obvious, as we've seen recently.

Fee waiver report - seems exactly what it is. It will give you on the left-hand side the fee waiver awards that you've set up, how much has been approved, how much has been sent. And again, it comes in this PDF and Excel format. As I say, hardly anybody uses fee waivers...

Anne Thomson

Anymore, no.

Jim Kersse

This report is the approvals report, which you can only get in a CSV format...

Electronic Voice

First, you have to unlock your device.

(LAUGHTER)

Anne Thomson

I thought we were getting attacked there or something!

Jim Kersse

It's determined! So, yes, this one only comes in CSV format, and the five categories allows you to see what you have approved, it also shows you whether you've rejected, cancelled or re-approved, depending on what status you have used.

And also this one is the... also only available in CSV format, and again can show you by student all of the information there, including the award name, the award type, whether the award was actually cancelled, approved, rejected, whatever you happened to do, the last time it was updated, and if there was any fee waivers, that's kind of highlighted in that last column to show it was a fee waiver. So, queries and guidance.

The full guidance is available on the front page of the Bursary portal, for those of you who have seen it. It's a very detailed guidance document. It's quite... I'm trying to think of the word. It's hard to read sometimes.

Anne Thomson

It's not bedtime reading.

Jim Kersse

I don't think so! We are trying to make it a bit more.....but less... It's difficult, because it has to be technical to do some things and really, we're trying to give you as much information as possible without it being a horrible read. And there's nothing... It is a horrible read. It's horrible when you have to go through and update it. So, yeah, but it is there for everybody to see, to use, obviously access it through the front page of the portal. You also have access to your account managers. Everybody should know who their account manager is.

And you also have access to our HEP services, as Partner Support Desk, who will either answer your query if they can or pass it to the account manager or myself. If we are the most appropriate people to be dealing with it. Right, that is us now to the point where...

Anne Thomson

Questions!

Jim Kersse

If anybody's got any questions?

Anne Thomson

Anybody got any questions in the room? Got some online questions. Looking like some people are sitting at home and they're not watching The Chase yet. Yeah, that's OK. No problem. I've just got a few. And we should be able to go through them quite quick. Somebody's asked, would we be able to add bursary award for last academic year, such as academic year 20-21? The answer is yes. As long as you have... If it's a brand-new one, you can, you can go back previous years and it doesn't need to be in that academic year.

So, all you'd do is add a new award, let your account manager know that you'd added this award. We would then ask for a forced reassessment so it pushes your students through and they would be picked up for that award, even if it was the previous academic year. So that's the answer for that one

Also, we have some issues with January starters not receiving their awards at the scheduled times, when the student transfers. But I think that must be like academic... like changing academic year starts as well. So, that is when a student should stay in the seasonal... with the seasonal start they originally started in.

But I can maybe, if you give me your email address, Scarlett, as well, I'll look into it further for you and maybe give you a call and just see if there's something we can work out that can help you. So, if you want to put your email in the chat, that's great. This is quite an interesting one from Kimberley and it's saying that a lot of students may be entitled to bursary and they don't want to take out a maintenance loan. So, there is a process, and I've gone through it with a lot of my skill-centred teacher training that get large bursaries, like for doing maths and physics and such as, and they don't want to take a loan, so that you...

It's kind of tricking the system a bit - so they go online and they say that they are wanting to take the loan out and then that allows them to put their bank details in, because if they say no, they don't want a loan, the system doesn't bring up the bank details page. So, you have to actually say you are taking a loan out and then say you're wanting zero loan, so that's a kind of workaround for sort of tricking the system into...

Because an ability to do that happened from 2016 when the maintenance grant was taken out of the application.

And we've got, say, when setting up foundation year, Kimberley said, you then choose year F in the administration, but then, when you look at the student assessment record, it shows as year 0, and that's the way that it's actually meant to be, because Kimberley was saying that would it be possible just to have the one value in there? But that's the way that it was added, and I don't know, maybe Jim can take that, but I think there is a reason for that?

Jim Kersse

Yeah, I think it's the way the system and SIS interact with each other. SIS treats foundation year as 0 although displays it as text "foundation year" which is weird, and Bursaries treats it as an F, so it is treated as an F code, just passed through to the system.

So, it is a bit of an idiosyncrasy within the system itself. We have looked at trying to fix it, but when you fix one, you knock the other one.

Anne Thomson

I think it really was set up to be like that, then - if you're using it as an award rule, saying that you're wanting to give it only to foundation students, or not pay foundation students, so I think it's the way that it's been set up.

I've only got two more, and I know you're all desperate to get away! So, I've got Emma asking, what does core service give you access to, that's not in full service?

Well, core service just gives you... You can view it all. It does... If you choose... So, you have that choice, as Jim said, one year you could just use the core service to just look at your students and the household incomes and maybe you export your system and pay them a different way, because you might use the household income, then say, well, give the student accommodation vouchers for that.

So, they might use it like that. Or you can then choose the... You choose the full service, that means then you're going to automate. You're usually going to actually let the system... Then you're going to approve all your awards through the system. But you can, as I say, use either.

So, there's not any... The difference is as well, for the core service, so everybody pays 50p for each of the students that come onto their student list. And the extra £1.75 if you choose to use the system to approve it. So that's a difference. And the last question, which is a good question as well, from Carol, saying, when are you planning to populate the Bursary pages for 22-23?

And as Jim said, after your invoices are paid! Because now, because the application cycle's open, you're seeing your students coming through now on SIS for 22-23. But once the invoices are paid, it's like the opposite. You'll usually see students sooner on the Bursary portal than you do on SIS because they only come on to SIS when they're fully approved.

But through the Bursary portal, you're getting them then from awaiting validation, that's a very early stage, and that's a good way as well of checking if someone comes and says... and you don't see them on SIS and they say, "No, but I've applied." So, if you went into the Bursary list, you would then see that they had started that process. So again, that's... So, they're all good questions. Thank you for everybody that's watching online. Is there anything else? If you think of anything, then you just need to come ask Jim. We'll be about until tomorrow afternoon.

Jim Kersse

Just kind of one thing to add is if there's anybody not using the Bursary system that wants to use the system or wants to consider using the system, then the first point of call is the account manager, and account manager will guide you through that process.

Anne Thomson

Does everyone in here use the system?

Jim Kersse

I think there's a fair few online that don't.

Anne Thomson

Oh, right, good. Well, contact your account manager.

Jim Kersse

OK. Well, thank you very much for your time this afternoon. I know it's the end of the day, everybody's dying to get away, but yeah, thanks for your patience, your time and your forbearance. OK, thanks a lot. Cheers.



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