

# Bursary Administration Service

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# Introduction



## The Bursary Administration Service



# Bursary Administration Service (BAS)



The Bursary Administration Service (BAS) provides HEPs with a means to assess your students for bursary, scholarship and fee waiver funding using the data gathered from student finance applications



Allows HEPs to manage their student funding eligibility in a way that is best for their institution



Provides HEPs with a means to pay awards to students via both automated predefined award rules and manual awards as required



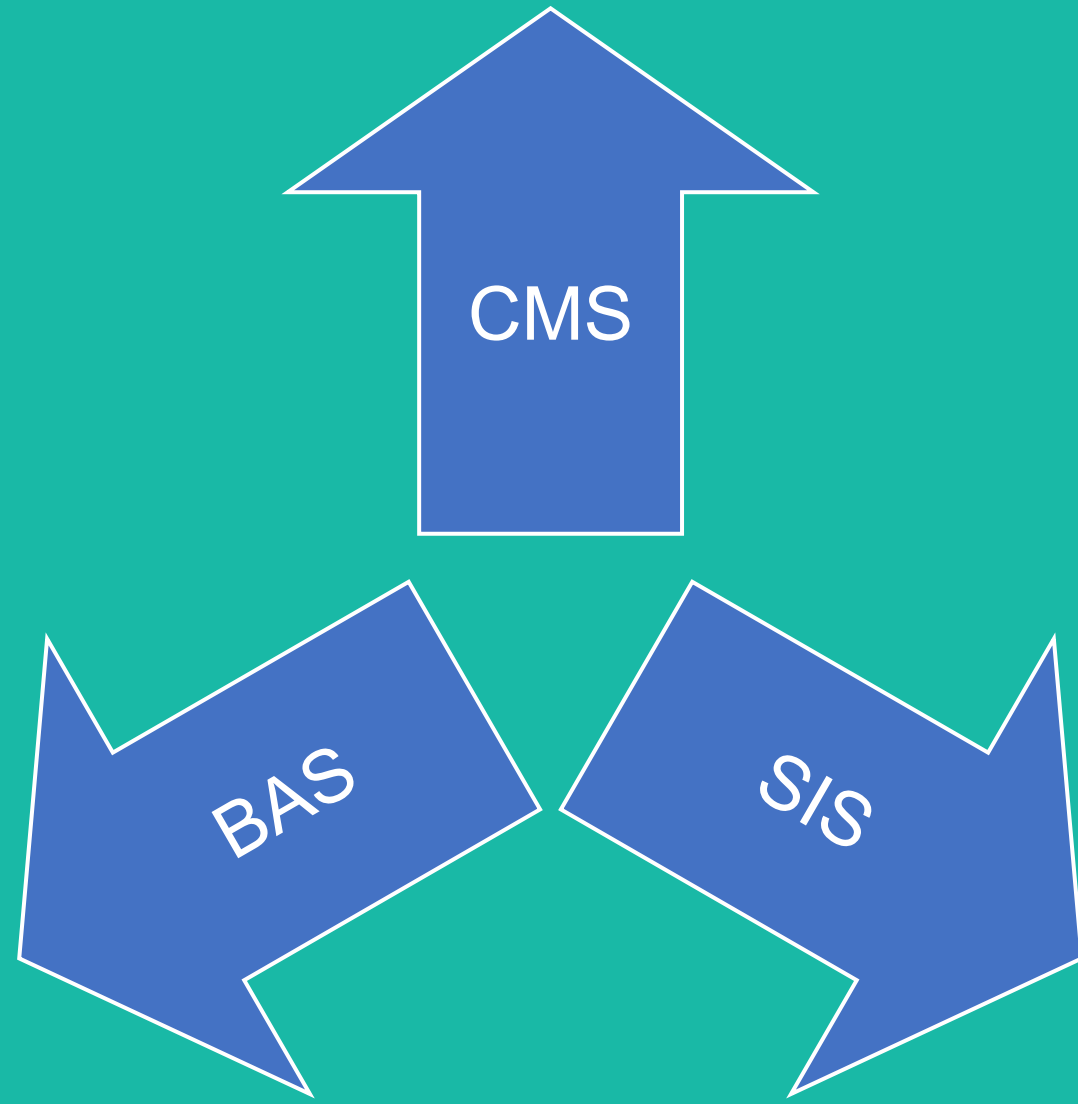
Assesses on average 1.4 million applications per academic year

# Bursary Administration Service

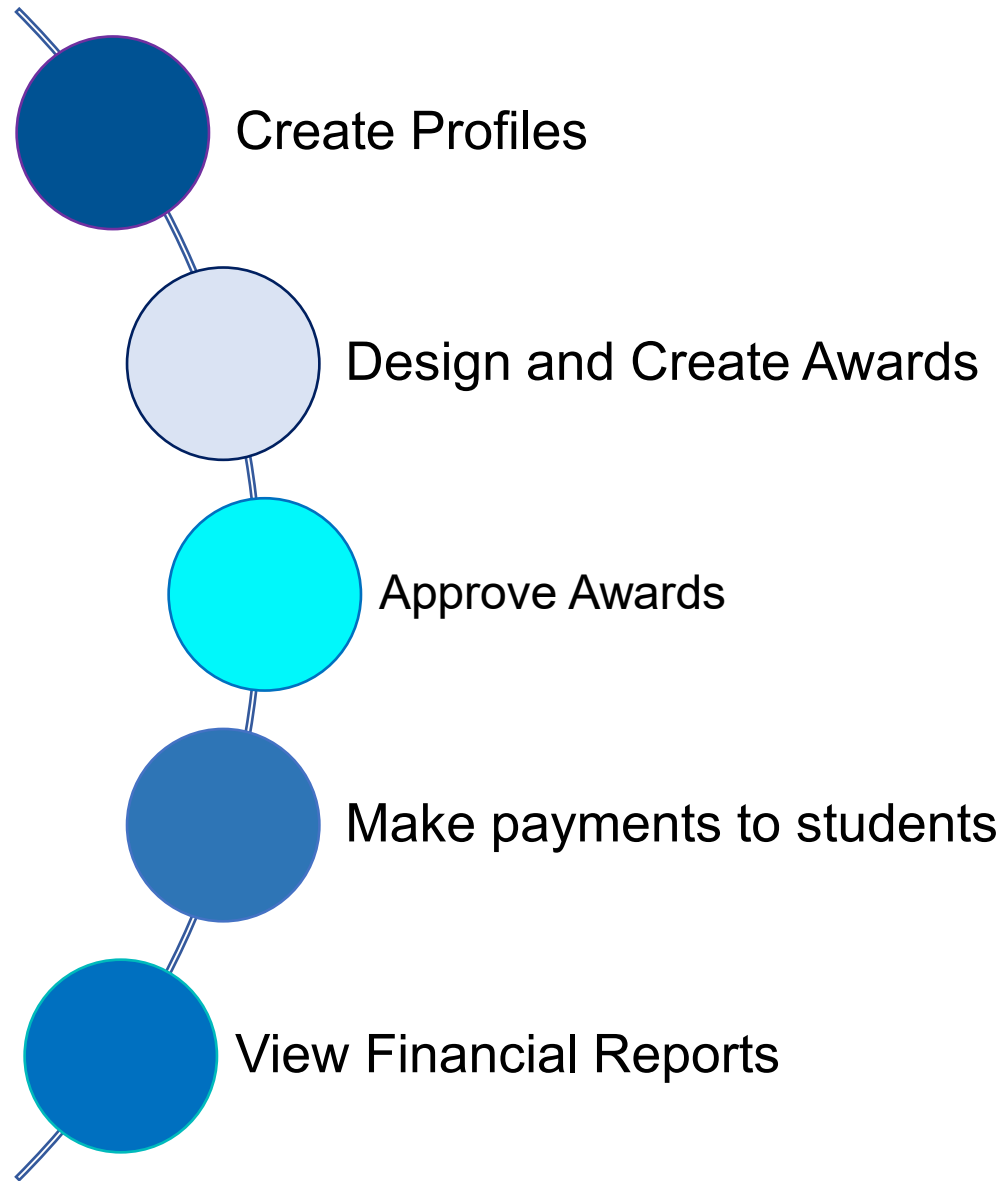
BAS links into SIS, CMS and other SLC portals to provide information for Bursary, Scholarship and Fee Waiver assessments

It will allow you to:

- Create tailored awards to identify students eligible for bursaries based on SLC application data
- Create bespoke and ad hoc awards
- Maintain and manage a central log of your bursary awards
- Produce reporting for each award including values and volume



# Overview



# Overview



Student data accessible through the Bursary Administration Service



Ability to assess a student's entitlement to Bursaries, Scholarships and Fee Waivers using your own criteria



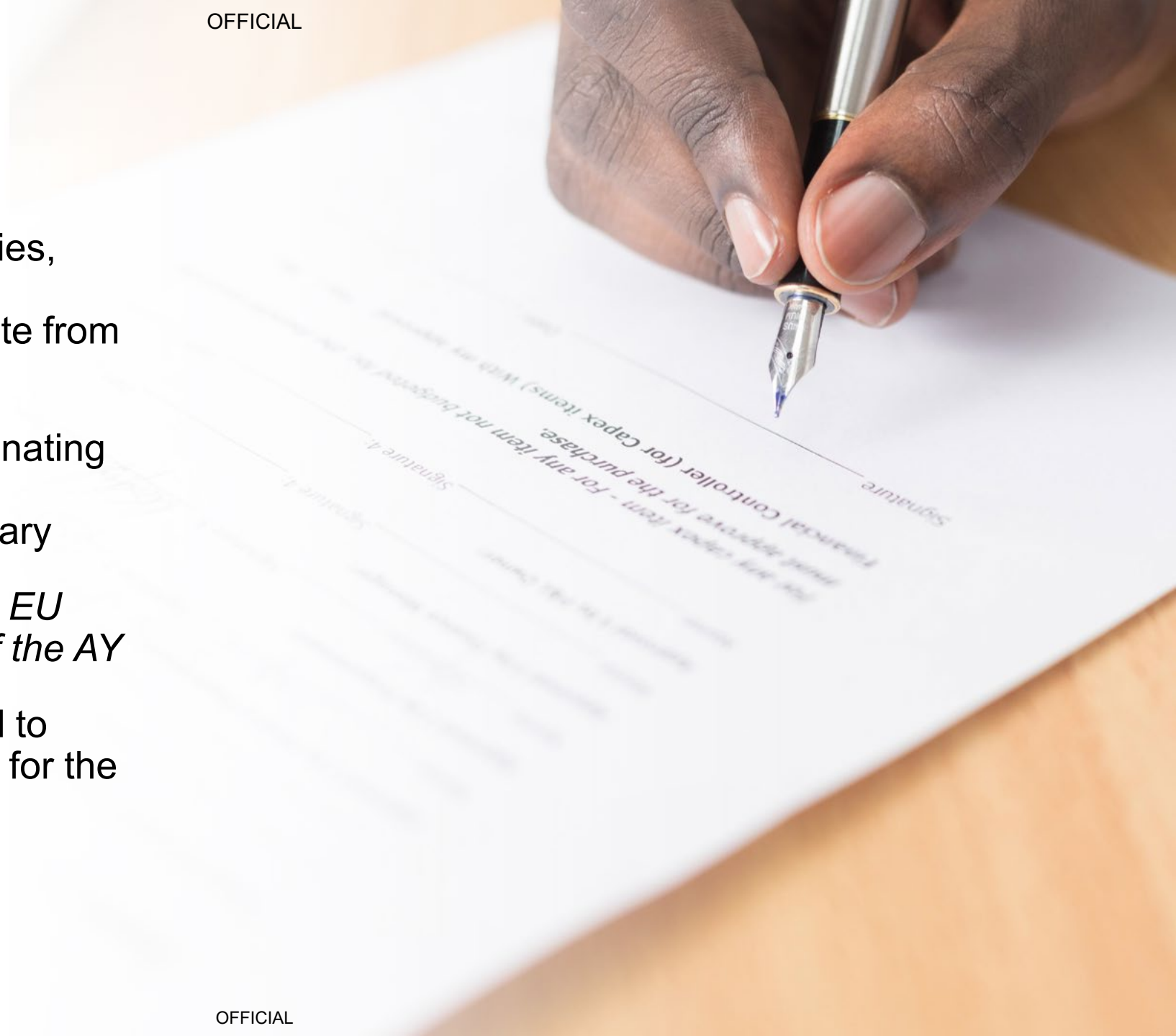
Send correspondence to students on behalf of the Higher Education Provider regarding their awards



Schedule and make payments to students or raise automatic Fee Waiver CoCs

# EU Bursary Set-Up

- In order to administer EU Bursaries, your institution must have an EU Bursary contract which is separate from the Core Bursary contract
- HEPs can choose between nominating specific students or allow all EU students to apply for an EU Bursary
- *Note: You will need to inform the EU Bursary team at the beginning of the AY*
- Students will be then be required to provide evidence of their income for the tax year



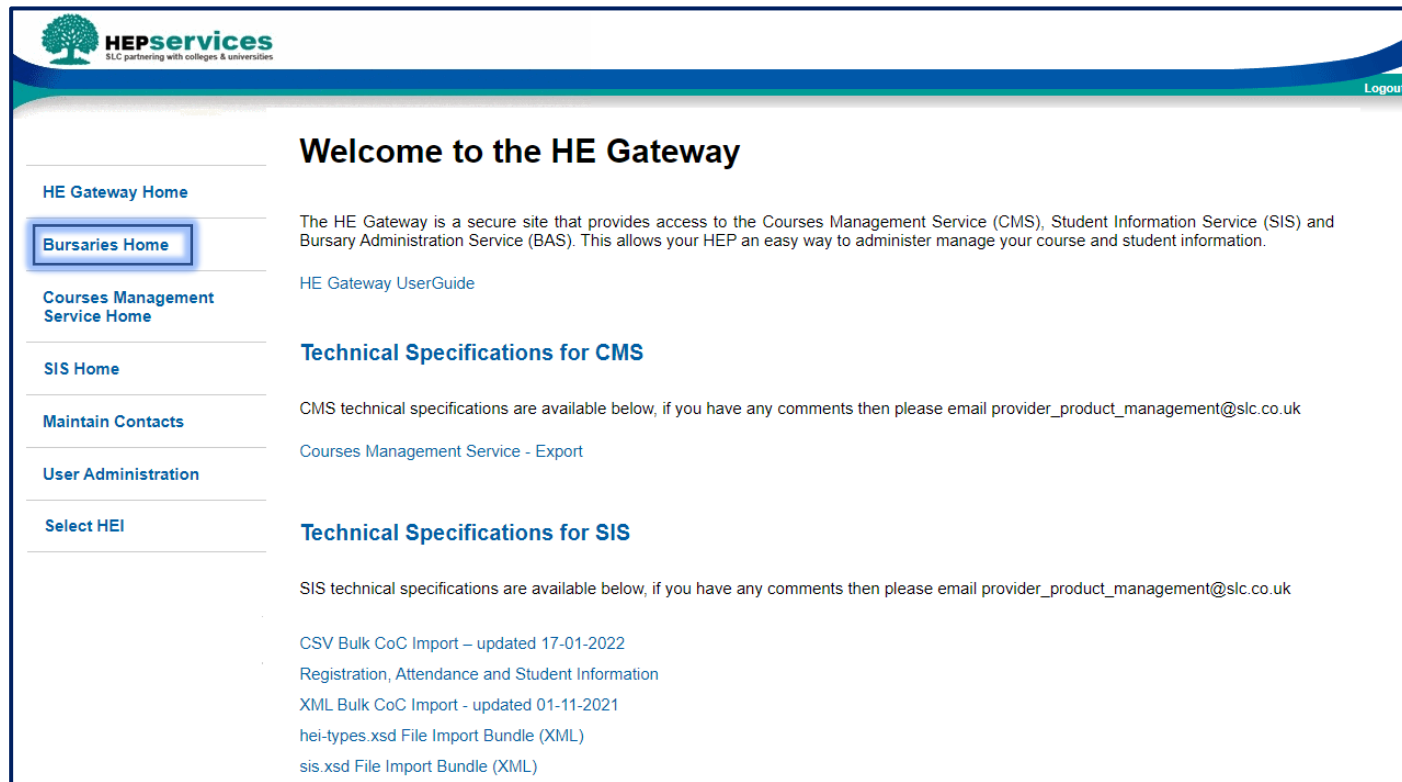


# Accessing BAS

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

The screenshot shows the top section of the website. At the top left is the HEP logo, which consists of a tree icon and the letters 'HEP'. To its right is a search bar with a magnifying glass icon and the text 'Search'. Further right is a button labeled 'Sign into the HE Gateway' with a yellow border. Below these elements is a dark blue navigation bar containing the following menu items: 'News and events', 'Our services', 'Resources', and 'Contact', each followed by a downward-pointing chevron. The main content area has a dark blue background. It features the title 'Higher Education Provider Services' in large white font. Below the title is the subtitle 'The Student Loans Company partnering with universities and colleges'. At the bottom of this section are two buttons: '→ Sign into the HE Gateway' (with a yellow border) and 'See our guides'.

# Accessing BAS



The screenshot shows the HE Gateway website interface. At the top left is the HEPservices logo with the tagline "SLC partnering with colleges & universities". At the top right is a "Logout" link. The main heading is "Welcome to the HE Gateway". Below this is a navigation menu on the left with the following items: "HE Gateway Home", "Bursaries Home" (highlighted with a blue border), "Courses Management Service Home", "SIS Home", "Maintain Contacts", "User Administration", and "Select HEI". The main content area contains the following text:

The HE Gateway is a secure site that provides access to the Courses Management Service (CMS), Student Information Service (SIS) and Bursary Administration Service (BAS). This allows your HEP an easy way to administer manage your course and student information.

[HE Gateway UserGuide](#)

### Technical Specifications for CMS

CMS technical specifications are available below, if you have any comments then please email [provider\\_product\\_management@slc.co.uk](mailto:provider_product_management@slc.co.uk)

[Courses Management Service - Export](#)

### Technical Specifications for SIS

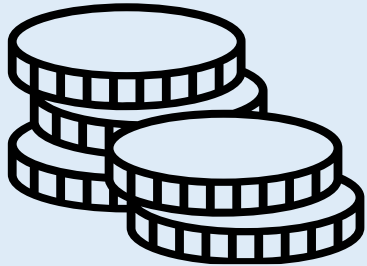
SIS technical specifications are available below, if you have any comments then please email [provider\\_product\\_management@slc.co.uk](mailto:provider_product_management@slc.co.uk)

- [CSV Bulk CoC Import – updated 17-01-2022](#)
- [Registration, Attendance and Student Information](#)
- [XML Bulk CoC Import - updated 01-11-2021](#)
- [hei-types.xsd File Import Bundle \(XML\)](#)
- [sis.xsd File Import Bundle \(XML\)](#)

# Generating Awards

# Generating Awards

## Payment Profiles



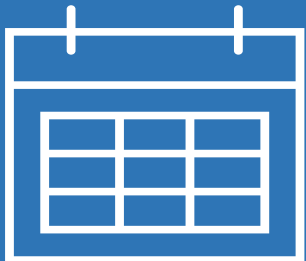
### When you want to pay the student

- HEP cash flow vs. student welfare
- Number of instalments: up to maximum of 12 during academic year



### What triggers should release the payment/s?

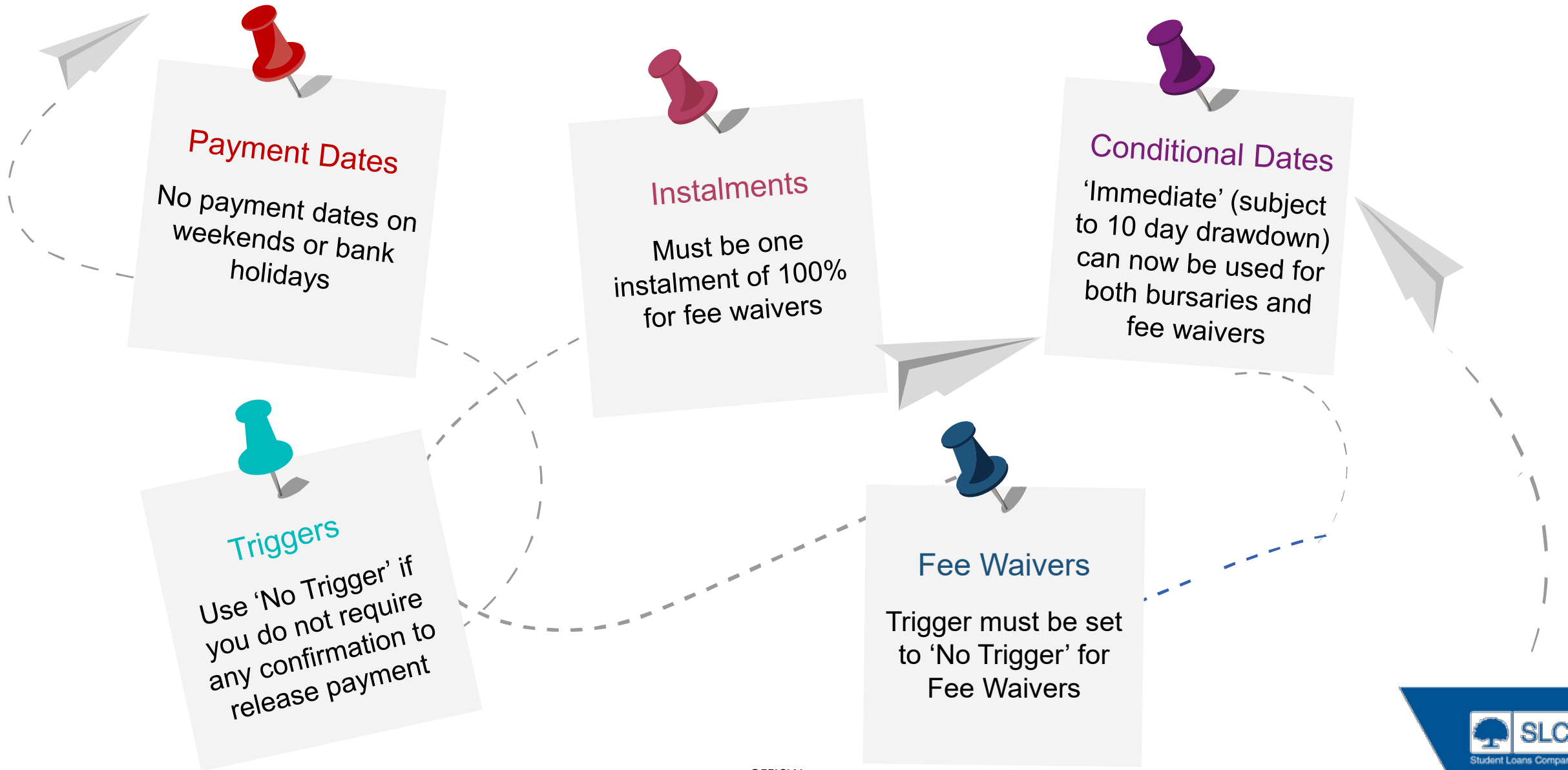
- Registration Confirmation
- Attendance Confirmation 1,2 or 3
- No Trigger



### The timing of the Drawdown Process

- Bear in mind funds are collected from your bank account 10 working days prior to your selected payment date

# Payment Profiles – Best Practice



# Generating Awards

## Automated Awards

- These are awards set up by your HEP using pre-defined rules
- You can create rules for Automated Awards based on specific criteria available in the Bursary Portal
- Once these awards are active the defined award rules will be automatically run against the HE student data

## Manual Awards

- These awards are best utilised when you wish to set up an award for an ad hoc purpose or where the reason is not available in the portal
- For example based on progression or Exam results

# Generating Awards

- Administrators can create and maintain awards for Bursary, Scholarship or Fee Waivers
- Awards can be Automated or Manual
  - The rules can be used to deliberately include or exclude certain students for awards
  - This allows awards to be tailored towards Student demographics and circumstances
  - Students can be eligible for more than one award
  - Can include a wide range of students
- Due to the potential complexity of the Automated Award Rules, each Automated Award created by your HEP will be reviewed by SLC
- Both Automated and Manual Awards can be edited up to the point of activation
- Only Automated awards which have been allocated a status of 'Review Completed' will then be permitted to be activated by your HEP



# Generating Awards

## Automated & Manual Rules Criteria

**Automated** Awards can be based on but not limited to:

1. Household income
2. Domicile
3. Commencing Year of Study
4. Tuition Fee
5. Teacher training / Qualification
6. Domicile
7. Care Leaver / Independent Status

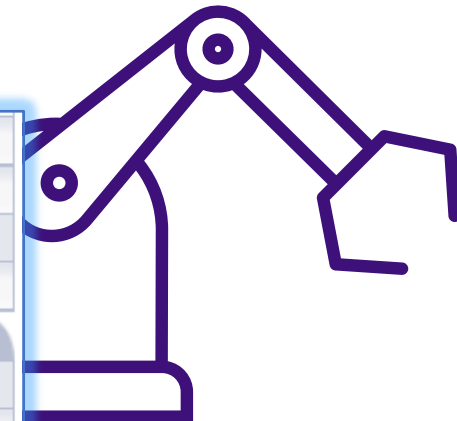
**Manual** Awards can be used for:

1. Academic results (A level etc)
2. Progression from schools / colleges
3. Distance from institution
4. Continued attendance
5. HEP specific application requirements
6. Sporting / musical achievements

	Age at Current Course St	is younger than		Delete Rule	
And	Age at First Year Start	is younger than		Delete Rule	
And	Campus ID	equals		Delete Rule	
And	Course Year	is	1	Delete Rule	
And	Dependants	is	Yes	Delete Rule	
And	Domicile	is	England	Delete Rule	
And	Final Year	is	Yes	Delete Rule	
And	HEI Code	equals	Please Select	Delete Rule	
And	Household Income	is greater than		Delete Rule	
And	Independent Reason	is	Over Age of 25	Delete Rule	
And	Method of Attendance	is	Accelerated Degree Attendance	Delete Rule	
And	Mode of Study	is	Full Time	Delete Rule	
And	NHS Funded	is	Yes	Delete Rule	
And	First Part of Postcode	equals		Delete Rule	
And	Principal Earner Income	is greater than		Delete Rule	
And	Qualification	equals		Delete Rule	
And	SLC Course Code	equals		Delete Rule	
And	Special Support Grant	is greater than		Delete Rule	
And	Maintenance Grant	is greater than		Delete Rule	
And	Tuition Fee	is greater than		Delete Rule	
And	UCAS Course Code	equals		Delete Rule	
And	New Student	is	Yes	Delete Rule	
And	Commencing Year of Stud	is	2006	Delete Rule	
And	Course Start Month	is	Jan	Delete Rule	
And	Cohort	is	Variable Cohort	Delete Rule	
And	Care Leaver	is	Yes	Delete Rule	
And	Special Support Element	is	Yes	Delete Rule	
And	Maintenance Loan Entitle	is greater than		Delete Rule	
And	Credit	is greater than		Delete Rule	
And	Intensity	is greater than		Delete Rule	

# Generating Awards

## Automated & Manual Rules Criteria



Select whether the amount is to be a set value or a calculated value: Multiple Band

Calculator Type: Multiple Band

Multiple Band Type: Household Income

Bands			
	From	To	Value
Band 1	0.00	30000.00	700.00

Select whether the amount is to be a set value or a calculated value: Set Amount

Calculator Type: Set Amount

Amount Payable: 700.00

Rules

	Household Income	is less than or equal to	30000.00	Delete Rule
Add Rule				
Add Block				

# Generating Awards

## Automated Rules Criteria

Rules

Tuition Fee equals 9250.00

And

Commencing Year of Stur in 2017,2018,2019,2020,2021

Review Comments- Not Submitted

Commencing Year of Stur is not 2013

Commencing Year of Stur is not 2014

Commencing Year of Stur is not 2015

Commencing Year of Stur is not 2016

Course Year is 5

Course Year is not 1

Course Year is not 2

Course Year is not 3

Course Year is not 4

Course Year is not F

As the tuition fee has been set at 9250.00, the next two criteria

By using “in”, instead of “is” reduces the rule to 1 line

This section is not required as the “Commencing Year of Study” is called out in the previous section

Course year is called out as year 5, other criteria is irrelevant

# Generating Awards

## Automated Rules Criteria

Rules

Tuition Fee

Select whether the amount is to be a set value or a calculated value

Set Amount

Select

And

Calculator Type: Set Amount

Amount Payable 700.00

Rules

Household Income is less than or equal to 30000.00 Delete Rule

And

Tuition Fee equals 9250.00 Delete Rule

And Commencing Year of Stud in 2017,2018,2019,20 Delete Rule

And Course Year is 5 Delete Rule

And Course Year is not 1 Delete Rule

And Course Year is not 2 Delete Rule

And Course Year is not 3 Delete Rule

And Course Year is not 4 Delete Rule

And Course Year is not 6 Delete Rule

# Generating Awards

## Use 'Copy' function to replicate and amend awards

- Should you wish to make awards which are similar but for are targeted at a different demographic you can copy an award then make amendments to the award rules to suit the rules required for the new award
- Instead of creating multiple awards think about using 'multiple banding'

## And / Or criteria

- 'And' to include
- 'Or' to exclude

## Fee Waivers only:

- Ensure the 'Category' is set to Fee Waiver
- Use the criteria 'Domicile is not Scotland' as you must exclude Scottish (SAAS) students



# Generating Awards

- Creating new awards or copying awards from the previous AY remember to check; payment triggers; award criteria; and payment amount
- Please remember to check payment dates as we are unable to pay students on a Bank Holiday or Weekends
- Account Managers need to approve your automated awards before they can become active on the system. We will check the logic of the dates and the award rules
  - Should the Award rules be invalid, the review will fail. The Account Manager will provide feedback
  - After the award has been reviewed by the Account Manager. It can be activated
  - Once the Award is active it cannot be edited



# Generating Awards Correspondence

## Options

Letters sent out in post

Email to advise student to check 'My Account' for correspondence

No correspondence



## Scholarships

Separate letters for Bursary/Scholarship Awards and Fee Waivers

Standard wording (Automatically Generated) or;  
Customised text

## Branding

HEP branded literature (Bilingual for Welsh Providers)

Logo

Authorised signatory



# Generating Awards Correspondence



## Best Practice

Remember the following when entering new awards for the next academic year

### Customised Text



Remember to review your customised text if you have chosen letters or e-mail correspondence. This text is rolled over from the year before and will be issued to your eligible students and you may wish to make some amendments

### Signatories



Remember to review your correspondence signatories each year. Again, these will be rolled over.

You can also change your signatories at any point through the year, if required

### Method



You can switch between letter and e-mails at any point by notifying SLC



# Approving Awards

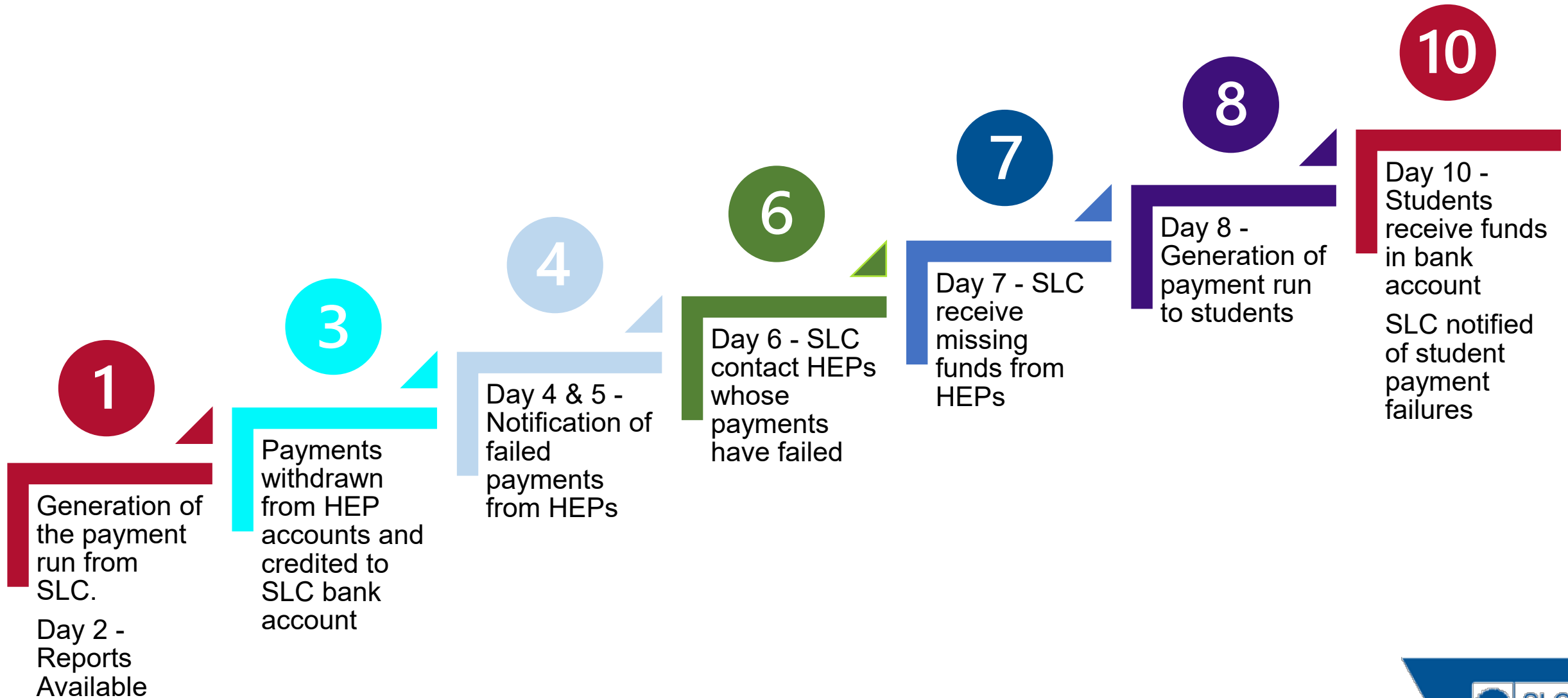
# Approving Awards

- Before approving your awards make sure to remember the following:
- Check that your customised text is up to date before approving awards
- Reject any transfer out / withdrawals / cancelled and deleted applications first
- Approve changes you make – any manual actions will require a second user to approve this action
- All non approved awards should be rejected to remove from the approval list



# Finance & Reporting

# Finance & Reporting Payment Drawdown



# Finance & Reporting

## Common Questions and Queries About Drawdown

- Once you have entered the drawdown period, SLC in most cases are unable to put an emergency stop notification on any approvals which have been made in error or if you decide that the student is no longer eligible for the award, for example they have withdrawn from the course
- It is important that you ensure that awards you have approved only include students you want to pay before the drawdown period begins
- SLC will not be able to make payments on an HEPs behalf if we are unable to draw down money



# Finance & Reporting

## Annual Subscription Invoicing Process

The service is free to join, with no minimum annual fee. We will only charge you for the student records you have access to and the approvals you make:

- Per application (core service): £0.50 per student record
- Per Approval (full service): £1.75 per student record

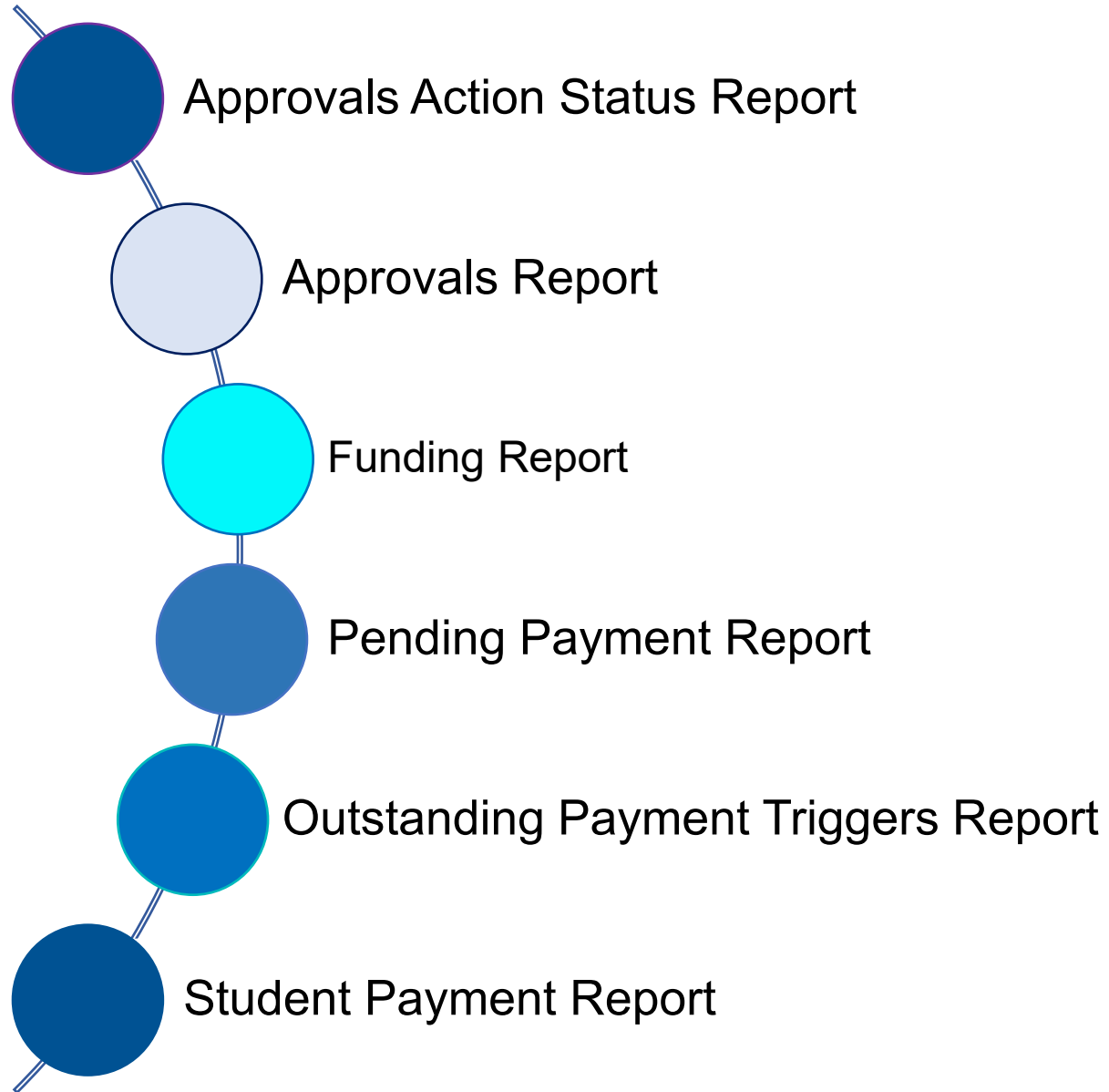
If you wish to provide a bursary to EU students, they can submit their household income for consideration. The cost of this service is £7.25 per student record

We will invoice this in arrears on an annual basis, covering the financial year from March to February. The easiest way to pay and our recommendation is to set up a Direct Debit

The charges quoted here exclude VAT

Failure to pay will result in escalation and suspension of the service

# Financial Reports



# Finance & Reporting

## All Reports

### Funding Report

Create a report showing your HEI's payment instalments in a collection run, and the total payment amount requested by SLC - correct as at close of business last night.

PDF XLS

### Student Payment Report

Create a report showing forecasted totals, actual totals and funds already paid by your HEI - correct as at close of business last night.

PDF XLS

### Outstanding Payment Triggers Report

Create a report which details all students who currently have scheduled payments and an outstanding payment trigger(s)- correct as at close of business last night.

PDF XLS

### Pending Payment Report

Create a report which details those students who currently have payments pended - correct as at close of business last night.

PDF XLS

### Fee Waivers Report

Create a report showing total approval amounts for fee waivers as well as details of student's instalments that have been sent or are due to be sent.

PDF XLS

### Invoicing Applications Report

Create an invoicing report which details applications which have been published to Bursaries.

XLS

### Invoicing Application Summary Report

Create an invoicing report which provides the number of applications published to Bursaries for the selected time period.

XLS

### Invoicing Approval Report

Create an invoicing report which details applications which have been approved in Bursaries.

XLS

### Invoicing Approval Summary Report

Create an invoicing report which provides the number of applications approved in Bursaries for the selected time period.

XLS

### Approvals Report

Create a report which provides details of all outstanding actions on 'Approvals List' - correct as at close of business last night.

CSV

### Approvals Action Status Report

Create a report which details the last action performed on awards within the Approvals List screen - correct as at close of business last night.

CSV

### Fund Collections Report

SLC Use Only: Create a report showing funding requests made to HEIs within a specific date range.

PDF XLS

### Automated Rules Submission Report

Create a report which details the current review status of automated awards.

[View Report](#)



# What's New?

# Enhancements

- Include Estrangement in search and award criteria

The left screenshot shows a search criteria form with a dropdown menu for 'Independent Reason' that includes 'Over Age of 25' and 'Under 25 and Parents Estranged'. The right screenshot shows a 'Rules' configuration screen with a dropdown menu for 'Independent Reason' that includes 'Over Age of 25', 'Under 25 and Self Funding', 'Under 25 and has a Dependant', 'Under 25 and Care Leaver', 'Under 25 and Parents Estranged', and 'Other'.

- Awards activated in the previous academic year are automatically rolled over for the new year
- A delete option has been added to allow you to remove awards set up in error or are no longer required

The screenshot shows the 'Awards List' interface. The 'Fetch Award For Deletion' dropdown menu is open, showing options: 'No', 'Please Select', 'Yes', and 'No'. The 'Filter Results' button is visible at the bottom.

# Enhancements

- A bursary specific training course was delivered in multiple locations
- Student email correspondence now includes your logo
- Assessment screen updated to show Foundation Year as F

Course Name	BSC (HONS) ACCOUNTING AND FINANCE INCLUDING FOUNDATION YEAR (3-YEAR ACCELERATED) (GU)-FEB	Household Income	£
UCAS Code	AF05	Principle Earner Income	£
Application Type	FT		
Course Type	OTHER	Number of Sponsors	
SLC Course Code	949568	Evidence Verified	Yes
Course Start Date	06/02/2023	Means Tested	No
Course Year	F	Adult Dependents Grant	No
Qualification	BDEG-HON	Childcare Grant	No
Course Fee	11100	NHS Income Assessed	No

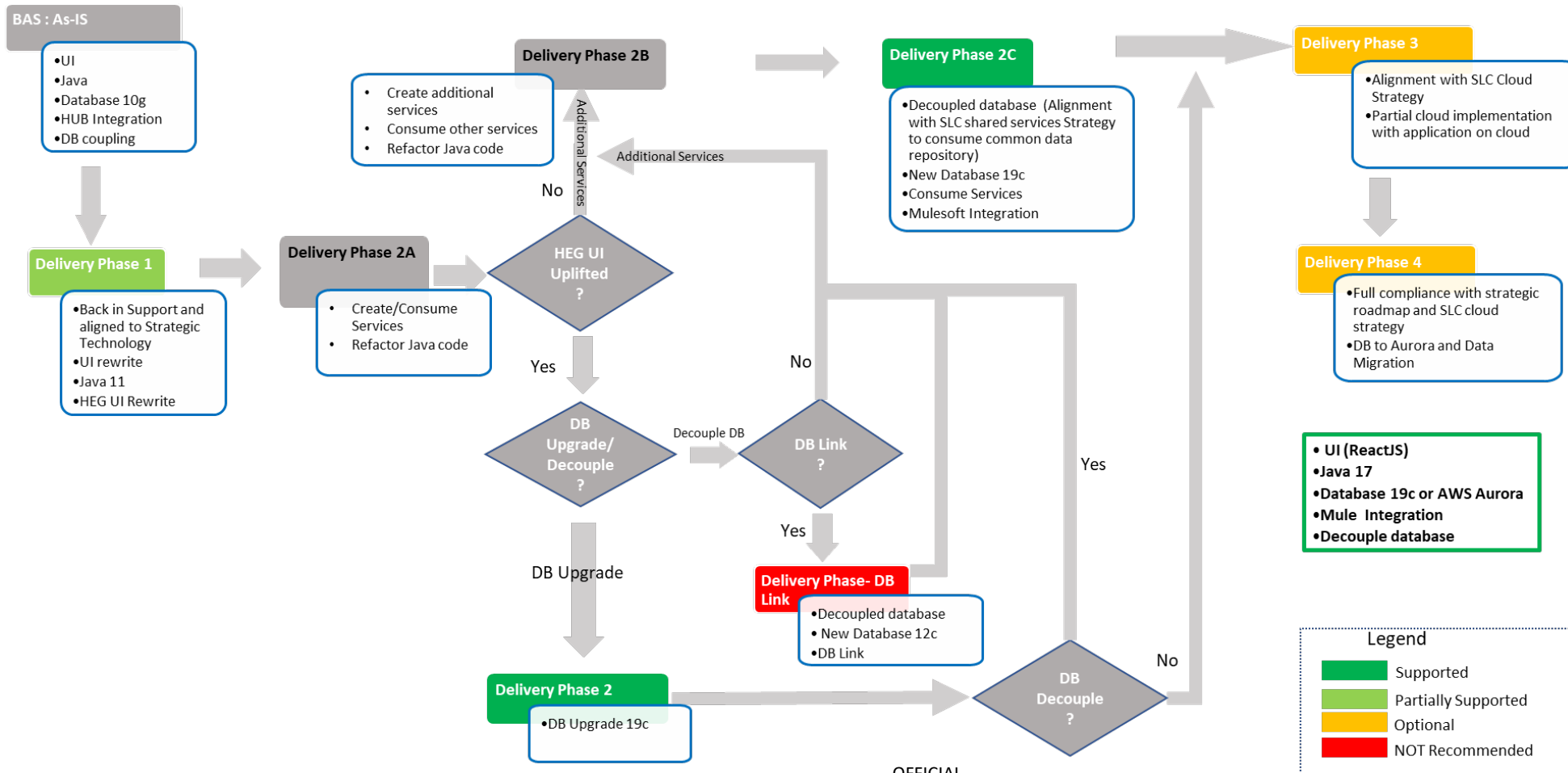
- Formalised process introduced for onboarding new subscribers to BAS
- Establishment of a BAS User Group
- Automated notification process deployed to alert account managers when a new award is ready for review. Reciprocal message sent to provider when review is complete
- When a students application is re-assessed, previously cancelled awards are no longer automatically reinstated





**COMING  
SOON!**

# Enhancements to look out for

- Include All independent reasons as an option in the search and award criteria
- System Uplift – BAS Roadmap



# Enhancements to look out for

Out of Support 	BAS AS- IS	Delivery Phase 1	Delivery Phase 2	Delivery Phase 3	Delivery Phase 4
Active Support 					
User Interface	Tapestry 3 	ReactJS 	ReactJS 	ReactJS 	ReactJS 
Application Middleware	Hibernate 2.1.7  Java 4  EH Cache 1 	Java 11  EH Cache 3  Spring boot 2 	Java 11  EH Cache 3  Spring boot 2 	Java 17  EH Cache 3  Spring boot 3 	Java 17  EH Cache 3  Spring boot 3 
Application Servers	OC4J  Apache 2.2 	Tomcat 9 	Tomcat 9 	Tomcat 9 	Tomcat 9 
Integration	HUB  RabbitMQ 	HUB  RabbitMQ 	MuleSoft  Anytime MQ 	MuleSoft  Anytime MQ 	MuleSoft  Anytime MQ 
Application Build	Maven 1.0.2  Jenkins 	Gradle 8  Jenkins 	Gradle 8  Jenkins 	AWS Build 	AWS Build 
Database	Oracle 10g 	Oracle 10g 	*Oracle 19c 	*Oracle 19c 	**AWS Aurora 

# Queries & Guidance

# Further Guidance



For guidance information  
for SIS, CMS, BAS,  
the Service Agreement  
and  
news

please visit the HEP  
Services website:  
<https://www.heinfo.slc.co.uk>



Contact the Partner  
Support Desk

E-mail:  
[HEP\\_Services@slc.co.uk](mailto:HEP_Services@slc.co.uk)

Phone: 0300 100 0642



Contact your Regional  
HE Account Manager



**Questions**

