

NOTES AND GUIDANCE for completion of Financial Information Service (FIS) Templates for Academic Year 2009/10

BACKGROUND :

As you will be aware, over recent months, we have been in communication with yourselves to ask you to provide us with your URL, logos and financial information (course fee, bursary and scholarship and contact details) for Academic Year 2009/10 in order to populate our 'Enhanced Ready Reckoner' tool.

Thank you to those who have submitted information to date - this tool is now currently available to all Welsh and Northern Ireland students via Student Finance Wales (www.studentfinancewales.co.uk) and Student Finance NI (www.studentfinancenl.co.uk) respectively and will launch shortly for English students via Student Finance England (formerly Direct)

As part of our continued drive to improve the customer experience we are now in the final stages of developing a new interactive calculator 'My Fact Find'. This will allow prospective students entering Higher Education in Academic Year 2009/10 to not only obtain an estimate of their national support entitlement but also, in addition to the text already captured for the Enhanced Ready Reckoner, will calculate any bursary or scholarships entitlement too.

To collate and maintain the financial information necessary for 'My Fact Find' we have created a new service - the Financial Information Service (FIS) within HE Services Portal which will allow HEIs access to facilitate the administration of this data. (you will be asked in **Worksheet 4** to identify users for this new service, along with the required access levels)

If you have already submitted your financial information (Supplementary Financial Information) for the Enhanced Ready Reckoner we will automatically transfer this to the Financial Information Service, where you will be able to view, edit and maintain this text going forward for 'My Fact Find'. If you have not already provided any information to date please complete **Worksheet 3**

In order to run the calculations for 'My Fact Find' we shall also need to gather your 'rules' - a set of criteria which determines the basis of your bursary or scholarship award and which allows the system to automate the calculation process behind the scenes.

If you have any bursary or scholarship awards (which can be automated using the set of criteria given in the guidance notes) please provide us with details on **Worksheet 2**

GENERAL:

Please read the guidance notes carefully and ensure that you complete Worksheets 1, 2 and 4 fully. Worksheet 3 is optional depending on whether or not you have already submitted information. If you require any further guidance please contact your HEI Relationship Manager or email HEI_SERVICES@SLC.CO.UK

Please ensure your institutions name and HEI code are entered on all worksheets and correspondence as these worksheets will be separated during processing

HEI Name	E.g. University of	This is the name your institution has supplied on the annual HEI Courses database.
HEI Code	E.g. TZPG	This is the 4 digit alpha code supplied by SLC. It can be found on your Attendance Confirmation Report (ACR) or Student Support Attendance Registration (SSAR). Or alternatively, please contact SLCHEI Helpline 08457 023316 who will be able to advise.

WORKSHEET 1. HEI DETAILS

Please provide us with your HEI contact details and details of the person responsible for collating this data should we need to contact you at any stage to discuss.

WORKSHEET 2: FIS RULES GATHERING FOR AUTOMATED BURSARY AND SCHOLARSHIP AWARDS

Award Details

Name of award	This is the name used to describe the award on all student correspondence.
Award Description	This is used for SLCL/HEI purposes to identify the award on the Bursary Portal (relevant when there are different bands etc)

Award Entitlement Criteria This section allows you to enter the rules for each bursary/scholarship award that can be automated using the following criteria. The entitlement criteria for each award can be entered in any order/combination that you require. Please be as complete and detailed as possible when entering your requirements and if in any doubt, contact your HEI Relationship Manager for further guidance or email HEI_Services@slc.co.uk

Course Related Criteria

Semester 2 start date	The system assumes a September start date	SLC course codes NEED to be specified for any other semester starts
Course Tuition Fee	Is less than; is equal to; is greater than;	Please be specific if you do not wish the award to apply to all students irrespective of fee level
Course specific:	SLC course code [equals/does not equal]	The SLC course code should be used when referring to any course related rules. This code is available from your annual HEI course database submission.
Course Type	[is/is not] BA, BSC, PGCE, NHS etc	Please ensure that the description of the course type is the same as that recorded on the HEI database and specify if any particular course type is to be included/excluded
Course Year	Is 1	If course year is relevant to award. <i>For the purposes of FIS rules only Course Year = 1 is applicable.</i>
Method of Attendance	[is/is not] Full-time/Part-time/ Other	This should be selected if you wish to make awards to students who are either Full-time, or Part-time

Student Personal Related Criteria

Age at current course start date	student is < or > xx years	At start of course year
Domicile	[is / is not] Scotland, England, Northern Ireland, Wales or UK	Domicile in a specific country at the time of making their application for funding through National Support.
Home Postcode	[is /is not] xxxx e.g. SW22	This allows an award to be made to students based on home postcode. Please note, only the first 4 digits of a postcode should be completed. (The system reads a postcode from right to left, ignores 1 st three digits so this will assist with any confusion where the first part of a postcode has only three digits. e.g. SW22 1BB, the HEI must only enter SW22)
Maintenance Grant /Special Support Grant	Either specify as 'Maximum ' or enter amount	is less than ; is less than or equal to; is equal to ; is equal to or greater than ; is greater than
Household Income: Select from one of the following options -		Household Income is defined as total income, less disregards, without considering parental contribution to student support. The rule can allow for both fixed amounts or a variance according to bands of income.
	Set Amount	is less than ; is less than or equal to; is equal to ; is equal to or greater than ; is greater than
	Proportion of Grant	need to specify maximum amount payable and optional minimum amount payable if not reducing to zero e.g. maximum £750 payable if full grant received and reducing in proportion to the grant payable until a minimum £50 payable when grant reduces to zero
	Sliding scale (one or two band)	need to specify maximum and minimum amounts payable, income thresholds and steps e.g. Maximum £1000, minimum £100 reducing in steps of £50 for every £1000 increase in income from £17,910 - £38,330

WORKSHEET 3. SUPPLEMENTARY FINANCIAL INFORMATION

Only enter details on this worksheet if you have not already provided us with text for the Enhanced Ready Reckoner. Text already provided to SLC will automatically be transferred to the Financial Information Service (FIS) for you to view, edit and maintain.

WORKSHEET 4. FINANCIAL INFORMATION SERVICE (FIS) USER ACCESS

Please provide details of all staff who require access to the Financial Information Service via the HE Services Portal and the required level of user access

NOTE: It is important to advise us if anyone already has access to the HE Services Portal to administer/view either Bursaries or Courses Service to avoid duplicate user logins being created.