CHAPTER 1

(GBR) Setting Up Student Loans Company

The Campus Solutions Student Loans Company (SLC) feature assists Higher Education Institutions (HEIs) in the United Kingdom in administering their responsibilities regarding SLC student assistance programs.

This chapter provides an overview of SLC and discusses how to set up SLC processing.

Understanding SLC

The SLC administers government-funded loans and grants to students by working with approximately 200 local education (award) authorities, including:

- Local Authorities in England and Wales (LEAs)
- Student Awards Agency for Scotland
- Education and Library boards in Northern Ireland
- HM Revenue & Customs
- 700+ HEIs

HEI students apply for student support annually. Depending on where they live, they apply through their LEAs or directly to the SLC. Application files are available to the HEI in August just before the beginning of each academic year.

The SLC also administers maintenance payments to students and, optionally, bursaries and scholarships on behalf of the HEIs.

Prerequisites

Before setting up SLC, you must set up your academic institution and aid year.

You must also understand how checklists, communication, financial aid packaging, and disbursement work.

See lsfa, Setting Up Your Financial Aid Awarding Cycle, Establishing Aid Years.

See lsfn, Designing Your Academic Structure, Defining Academic Institutions.

Setting Up SLC Processing

This section discusses how to:

- Define SLC options.

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- Define search match options.
- Complete prerequisites for SLC FTE calculation.

Pages Used to Set Up SLC Processing

Page Name	Definition Name	Navigation	Usage
Student Loans Company Setup - Options	SFA_SLC_SETUP	Financial Aid, Student Loans Company, Student Loans Company Setup, Options	Define SLC options.
Student Loans Company Setup - Search Match Options	SFA_SLC_SRCH_MATCH	Financial Aid, Student Loans Company, Student Loans Company Setup, Search Match Options	Define search match options.

Defining SLC Options

Bundle 29
Added “File Type” parameter to HEBBS setup.

Access the Student Loans Company Setup - Options page (Financial Aid, Student Loans Company, Student Loans Company Setup, Options).

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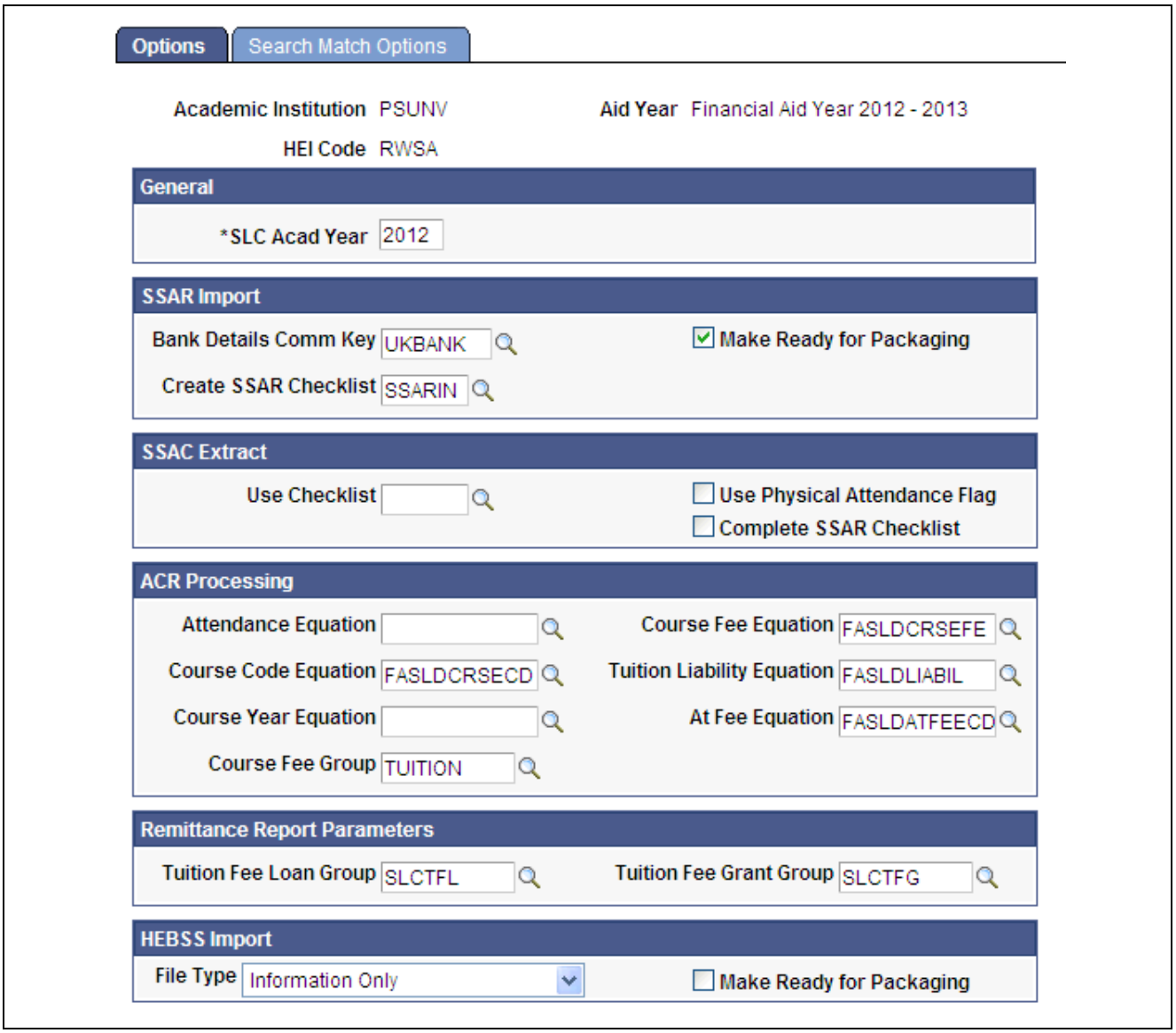

Student Loans Company Setup - Options page

General

SLC Acad Year (Student Loans Company academic year)

Select the year for which this setup is intended.

SSAR Import

Bank Details Comm Key (bank details communication key)

Select the communication key to be used when the Bank Details Held fields in the Student Support Attendance Requests (SSAR) files being imported have a value of *N*.

The communication is created only if the communication designated by the communication key does not already exist for the student.

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Create SSAR Checklist (create Student Support Attendance Requests checklist)

Select the checklist to be assigned to students when their SSAR record is imported.

This checklist can be used for controlling disbursement of Tuition Fee Grant (TFG) and Tuition Fee Loan (TFL) award disbursements. Disbursement rules can consider a checklist status. The checklist is created only if the designated checklist code does not already exist for the student.

Make Ready for Packaging

Select this check box to update the Packaging status to *Ready for Packaging.*

The Packaging status is updated for a student when either of the following is true:

- Initial SSAR data is received for the student for this SLC academic year.
- A subsequent SSAR file is received for the student for this SLC academic year with a TFL or TFG amount that is different from the amount stored for the student and the student's Packaging status is *Packaging Completed.*

SSAC Extract

Use Checklist

Select the checklist to be used when selecting the students to be included in the Generate SSAC Data process. When evaluating whether the student can be included in the SSAC Extract, the process determines whether the student has this checklist assigned and whether the checklist is complete.

Use Physical Attendance Flag

Select this check box to ensure that the Generate SSAC Data process checks to see if the student's physical attendance is confirmed when evaluating whether the student can be included in the SSAC Extract.

Complete SSAR Checklist (complete Student Support Attendance Requests checklist)

Select this check box to ensure that the Generate SSAC Data process updates the status of the checklist designated in the Create SSAR Checklist field to *Complete.*

ACR Processing

Use this group box to:

- Associate equations with each of the Attendance Confirmation Report (ACR) elements that is used to determine the At Fee Code that is sent in the ACR Response File from the HEI to the SLC.
- Designate a course fee group to be used in the Course Fee element.
- Designate an equation to determine the At Fee Code to be returned for each student with the ACR Response File.

At Fee Codes are defined by the SLC.

When writing equations to be used by the At Fee Evaluation process, ensure that they return values for the same calendar date. These values can be compared with students' ACR data to determine the At Fee Code. The exception is the attendance status, which is determined for the same calendar date as the other equations, but which has no ACR field to use for comparison.

The values that are available in the equation fields in this group box appear by default from the Equation Editor (EQUATION_EDITOR) component (Set Up SACR, Common Definitions, Equation Engine, Equation Editor, Equation Editor).

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If you write equations to be selected in the Attendance Equation, Course Code Equation, Course Year Equation, Course Fee Equation, and Tuition Liability Equation fields:

- The Attendance Equation must set the value for the SFA_SLC_EQ_ATTSTAT field.

  The translate values for SFA_SLC_EQ_ATTSTAT are *A - In Attendance, N - Not in Attendance,* and *S - Studies Suspended.*
- The Course Code Equation must return the UCAS or SLC Code for the course (depending on which type of course code was provided on the ACR).
- The Course Year Equation must return the year of the course of study/program in which the student is enrolled; for example, a value such as *1, 2, 3,* or *4.*
- The Course Fee Equation must return the amount of tuition fees charged to the student for this academic year.
- The Tuition Liability Equation should set the following equation engine variables:
  - SFA_SLC_EQ_TUITLN - Tuition Loan Amt
  - SFA_SLC_EQ_TUITGNT - Tuition Grant Amt
  - SFA_SLC_EQ_TUITSTD - Tuition Student Liable Amt

Course Fee Group Select the fee group to be used by the Course Fee equation. Values appear by default from the Student Financials Item Type Groups (ITEM_GROUPINGS) component (Set Up SACR, Product Related, Student Financials, Item Types, Item Type Groups).

All fields in the ACR Processing group box are optional.

However, to use the ACR At Fee Evaluation process, you must write an equation to be selected in the At Fee Equation field.

The At Fee Equation should be coded to populate the Equation Engine variable SFA_SLC_ATTEND_IND.

You can write the At Fee equation so that it uses the results of one or more of the other equations in the ACR Processing group box, or you can write an At Fee equation that does not rely on other equation results.

See lsfa, (UK) Using Student Loans Company, Running the ACR At Fee Evaluation Process.

Remittance Report Parameters

Use this group box to define which financial aid item type group represents Tuition Fee Grants and which financial aid item type group represents Tuition Fee Loans. This mapping enables you to create or modify a reconciliation query using imported Remittance Report data. The values for these two fields appear by default from the Financial Aid Related Item Type Group (PKG_REL_ITEM_GROUP) component (Set Up SACR, Product Related, Financial Aid, Awards, Related Item Type Group).

Tuition Fee Loan Group Select a financial aid item type group for this tuition fee loan item type.

Tuition Fee Grant Group Select a financial aid item type group for this tuition fee grant item type.

HEBSS Import

Bundle 29 **Added new field.**

File Type Select the HEBSS File Type you want to import:

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- Full Administration – Imports all fields.
- Information Only – Imports all fields except: Bank Details Supplied, Automated Award Total, Manual Award Total, Overall Award Total, and Previously Approved.

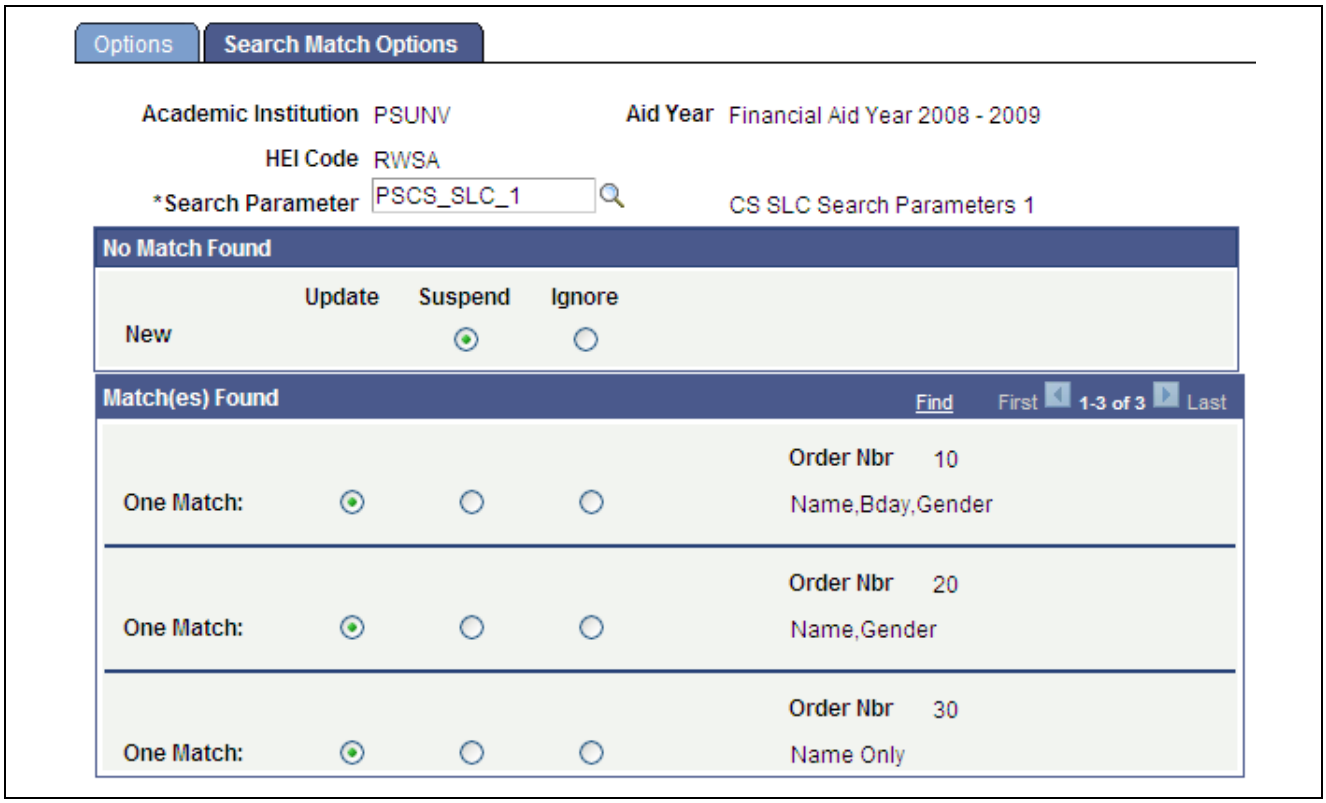
Make Ready for Packaging Select this check box to update the packaging status to *Ready for Packaging*.

The Packaging status is updated for a student when either of the following is true:

- Initial Higher Education Bursaries and Scholarships Scheme (HEBSS) data is received for the student for this SLC academic year.
- A subsequent HEBSS file is received for the student for this SLC academic year and the student's Packaging status is *Packaging Completed.*

Defining Search Match Options

Access the Student Loans Company Setup - Search Match Options page (Financial Aid, Student Loans Company, Student Loans Company Setup, Search Match Options).



Student Loans Company Setup - Search Match Options page

Use this page to select the search parameters that you want to use for the Import SSAR Files process, the Import HEBSS Files process, and the Import ACR/SISF process, and the subsequent actions to be taken for the different match scenarios.

Note. Students for whom an exact Student Support Number match exists have their records directly added to the Student SLC table and are not be subject to the Search/Match options defined on this page.

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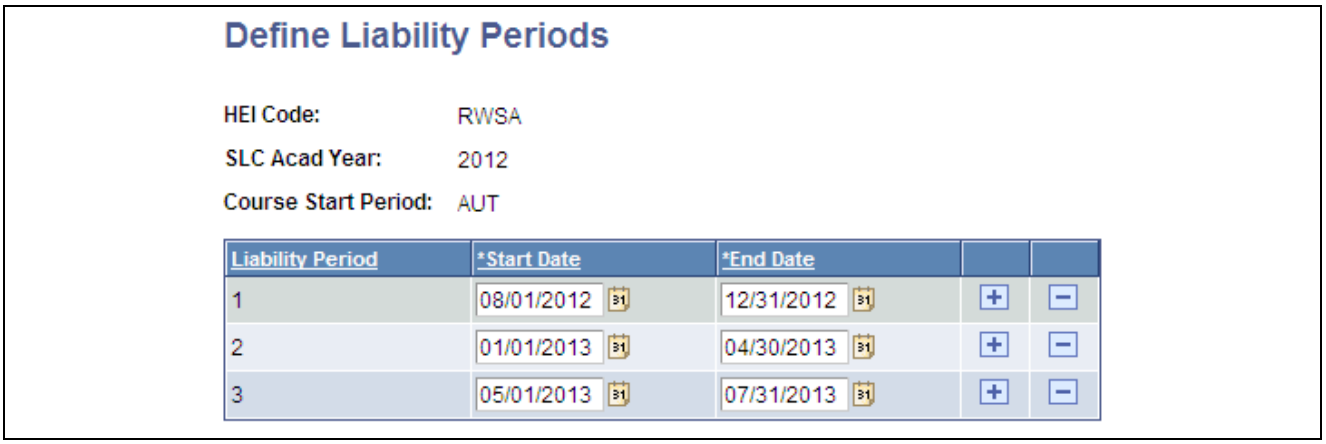
Defining Liability Periods

The section describes how to define Liability Periods for unique combinations of HEI, Academic Year, and Course Start Periods for determining student liability for full tuition fee loans.

Access the Define Liability Periods page(Financial Aid, Student Loans Company, Student Loans Company Setup, Define Liability Periods).



Define Liability Periods page

Liability Period Select the Liability Period for the context Course Start Period.

Start Date and**End Date** Enter the Liability Period Start and End Dates. Liability Period Dates cannot overlap.

Completing Prerequisites for SLC FTE Calculation

This section discusses the Campus Solution Student Records and Enrollment HESA (Higher Education Statistics Agency) setup required to use the SLC FTE Calculation.

1. Set up HESA in SACR Student Administration and Foundation Institution pages.

   Access the SA Features page (Set Up SACR, Install, Student Admin Installation, SA Features tab).

   In the United Kingdom group box, check the *HESA, UCAS* check box.

   See [PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook]Selecting Country-Specific Features and Enabling CRM for Higher Education Feature .

   Access the Academic Institution 6 page (Set Up SACR, Foundation Tables, Academic Structure, Academic Institution Table, Academic Institution 6 tab).

   In the United Kingdom group box, check the *HESA, UCAS* check box.

   See [PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook](AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features .

2. Ensure that the Reporting Period you want to use is defined and is *Active*.

   Access the Reporting Periods page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Reporting Periods.)

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3. Set up the HESA Configuration page for the Institution. If you are using an FTE Calculation Type of *Derive load from Modules*, then the Grading Basis Inclusion defined on this page needs to include the appropriate Grading Basis with the FTE check box selected.

   Access the HESA Configuration page (Records and Enrollment, HESA Reporting, HESA Returns Setup, HESA Configuration).

   See [PeopleSoft Student Records 9.0 PeopleBook]Configuring HESA.

4. Run the Create Instance for the Academic Institution or Program or the individual students whom an ACR will be processed.

   Access the Create HESA Instance page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Create Instance).

   See [PeopleSoft Student Records 9.0 PeopleBook]Creating HESA Instance and Person HESA Data Records for Students.

   Access the HESA Instance Data page to view or create an Instance record for an individual student. (Records and Enrollment, Career and Program Information, HESA Instance Details).

   See [PeopleSoft Student Records 9.0 PeopleBook]Entering HESA Instance Data for a Student.

5. Run the Create Module process for the Academic Institution and Reporting Period for the course enrollments.

   Access the Create HESA Module Data page (Records and Enrollment, HESA Reporting, HESA Returns Setup, Create Module).

   See [PeopleSoft Student Records 9.0 PeopleBook]Creating HESA Modules .

   The Run the Create Module process creates HESA Module detail in Curriculum Management. You can also create a single course or set of courses individually under the Curriculum Management. These would be the courses that the student is enrolled in during the reporting period. Make sure effective dates are before the reporting period and the Report to HESA Flag is selected. This information is used if the FTE process is run as *Derive load from Modules*. If using the *Derive load from Modules*, define the Module FTE value in the Module Data region.

   See [PeopleSoft Student Records 9.0 PeopleBook]Entering HESA Data for a Module.

6. For the Programs and Plans that students are enrolled in, set up the FTE Calculation Type to derive from Program or Modules; depending on which basis you are using for the FTE process. If using the FTE Calculation Type of *Derive load from Program*, define the FTE Load value. On the Plan HESA Data page, select the Report to HESA flag.

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Access the Program HESA Data page (Set Up SACR, Foundation Tables, Academic Structure, Academic Program Table, Program HESA Data tab).

See [PeopleSoft Student Records 9.0 PeopleBook]Entering HESA Data for an Academic Program.

Access the Plan HESA Data page (Set Up SACR, Foundation Tables, Academic Structure, Academic Plan Table, Plan HESA Data tab).

See [PeopleSoft Student Records 9.0 PeopleBook]Entering HESA Data for an Academic Plan.

See Also

[(GBR) Using Student Loans Company]Running the Calculate FTE Process

Completing Prerequisites for Reporting Part-time and Full-time Academic Loads

This section discusses the Campus Solution Student Records and Enrollment HESA (Higher Education Statistics Agency) setup required to report Academic Load for ACR Export files.

Access the Mode of Study page (Records and Enrollments, HESA Reporting, Codes and Mapping, Code Mappings, Mode of Study).

- Students with Academic Loads that *are not* mapped to a HESA Mode of Study value of *01*, *02*, *23*, *24* or *25* are considered part-time.
- StudentsAcademic Loads that *are* mapped to a HESA Mode of Study value of *01*, *02*, *23*, *24* or *25* are considered full-time.

The Mode of Study value can then be defined for the student at the Instance HESA Data, Sub-Plan Offering Year HESA Data, Plan Offering Year HESA Data or Program Offering Year HESA Data level.

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