

Office for
Students

The logo for the Office for Students, featuring a dark blue square with a yellow square in the top right corner containing the letters 'OfS' in white.

OfS

HESES20 training

Categorising your students and important definitions

Ross Lawlor

Funding Round Manager

30 September 2020

Follow us on Twitter at
[@officestudents](https://twitter.com/officestudents)

Webinar housekeeping

- Who is presenting today:
 - Main presenter: Ross Lawlor
 - Backup presenter: Claudia Stilliard
 - Q&A: Roger Lear
- How to ask a question:
 - Q&A versus chat
 - Opportunities throughout the webinar.
- Closed captions are available

Content of the series of webinars and timetable

- Introduction to HESES and changes from HESES19:
1330 on Monday 28 September 2020.
- **Categorising your students and important definitions:**
1330 on Wednesday 30 September 2020.
- Counting your students:
1330 on Monday 5 October 2020.
- Submission and verification of HESES20 data return:
1330 on Wednesday 7 October 2020.
- Hands-on workbook exercises and breakout groups:
1330 on Monday 12 October 2020
1330 on Tuesday 20 October 2020
1330 on Wednesday 14 October 2020
1330 on Thursday 22 October 2020

More information available at www.officeforstudents.org.uk/events

Supporting materials

- Recordings will be available from the Office for Students website on the events page.
- We will also publish the slides on the website and any supplementary materials.
- Providers should also refer to:
 - Guide to funding 2020-21 publication
 - **HESES20 – Higher Education Students Early Statistics survey 2020-21 guidance**
 - How to complete the HESES20 workbook publication
 - HESES website www.officeforstudents.org.uk/heses
 - HESES videos on the OfS YouTube page.

What we will cover today



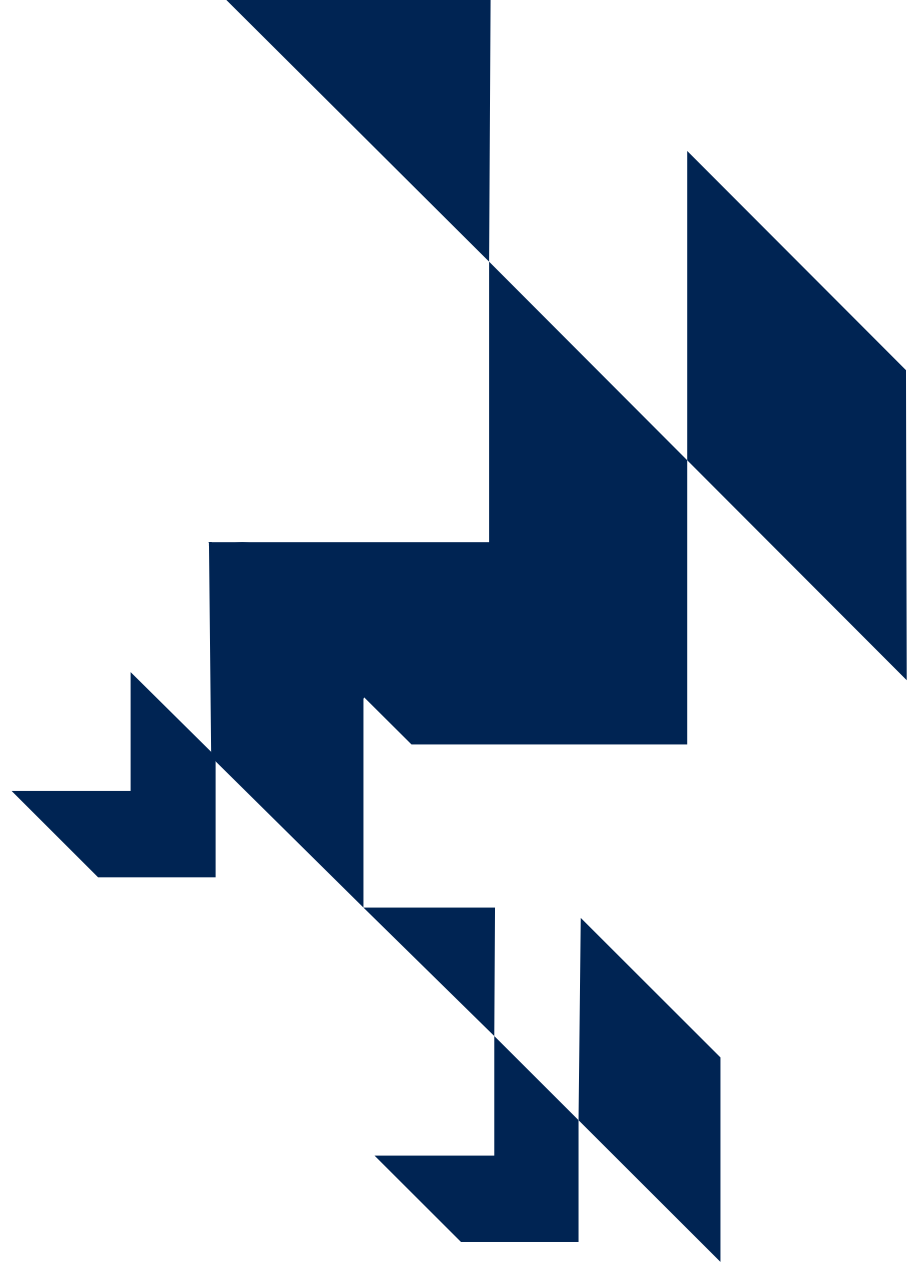
- Who should be included in the Higher Education Students Early Statistics (HESES) survey.
- How to categorise students by mode, level of study and subject.
- How to categorise your students by residential and funding status.
- How to determine which of your students are 'new entrants'.

How to find further guidance

Further guidance on the topics covered today can be found in the HESES20 guidance, in these Annexes:

Topic	Guidance
Definition of the HESES population	Annex A
Definition of recognised higher education for funding purposes	Annex B
Mode of study	Annex H
Level of study	Annex I
Price group	Annex G
Long or standard-length year	Annex J
Fundability / residential status / domicile	Annex F
New entrants	Annex C

The HESES20 population



What is recorded in HESES20?

- HESES counts '**years of instance**' – this is not the same as a student headcount.
- Students must be:
 - aiming for a **recognised higher education** qualification or higher education-level credit that can be towards one
 - **registered** with your provider and actively pursuing studies in 2020-21 academic year
 - spending no more than half the active study for their whole instance outside the UK.
- HESES20 only counts years of instance that **start** in the 2020-21 academic year.

Definition of recognised higher education

A course is recognised higher education for OfS funding purposes if it is:

- a course that is designated under the Education (Student Support) Regulations 2011.
- a 'course of higher education' as defined in Schedule 6 of the Education Reform Act 1988, other than one leading to a qualification in the Register of Regulated Qualifications.

Study for higher education-level credit may also be included if it meets the criteria in Schedule 6 of the Education Reform Act 1988 and **either**:

- it is not credit that may count only towards a qualification in the Register of Regulated Qualifications
- it is credit that may count towards a course that is designated under the Education (Student Support) Regulations 2011.

Students registered with your provider

Students should only be returned in HESES20 (and in other student returns) by the provider that they are **registered** with.

This is the provider which has the ‘full contractual responsibility to the student for the provision of educational services’.

- The Student Loans Company (SLC) pay tuition fee loans to the registering provider.
- For students on apprenticeships, this is the same as the **lead provider for the Education and Skills Funding Agency (ESFA)** – the provider that receives the apprenticeship funding from the ESFA.

Further guidance on this, including on joint courses and exchange students, is in Annex A.

Notes on apprenticeships



Some students may be taking their higher education qualification as part of an apprenticeship.

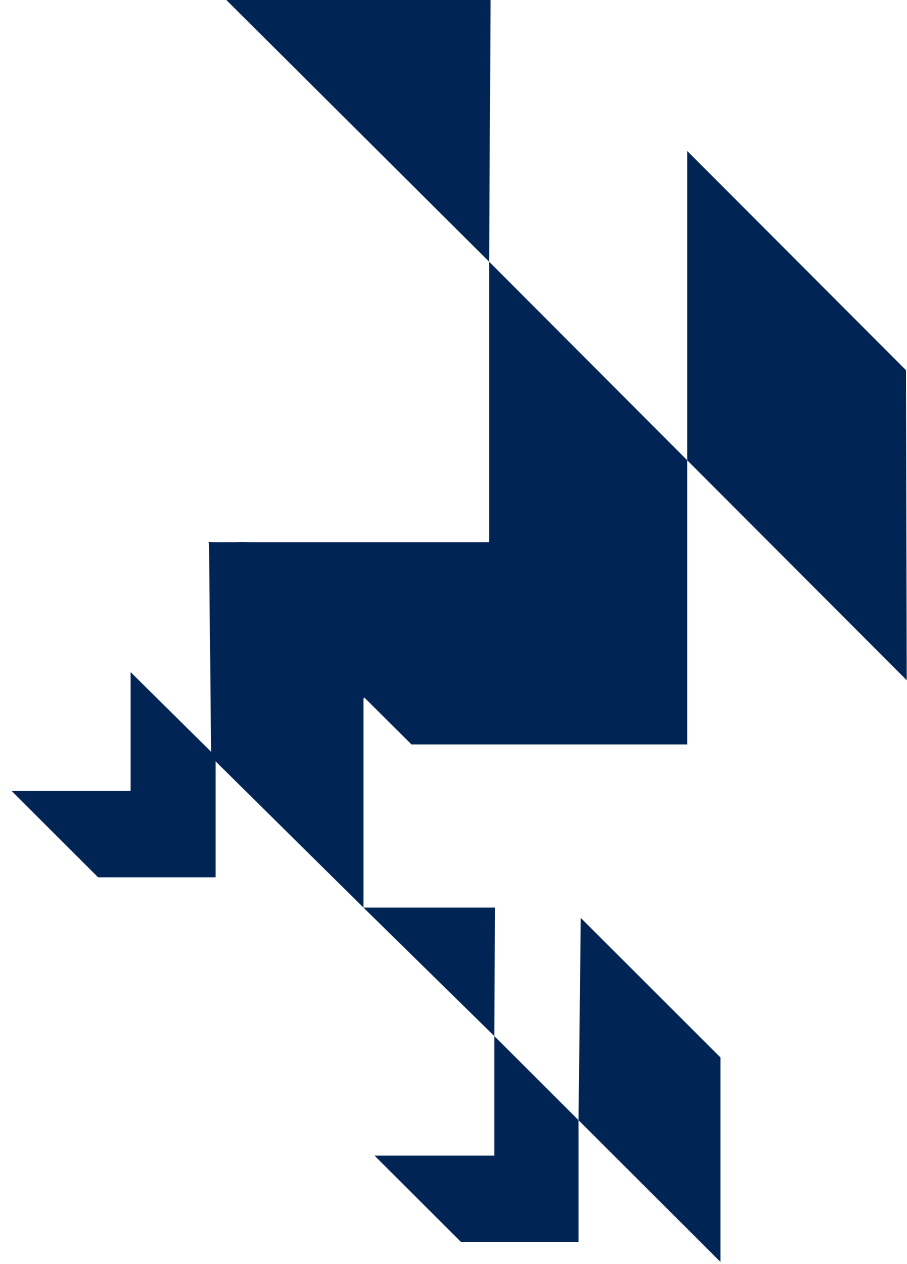
- They should be registered with and reported by the lead provider (usually contracted by the ESFA).
- We would normally expect them to be part-time.
- We only fund activity related to the higher education course.
- They are not considered to be closed courses (more on this later).
- They are reported in HESES the same as any other student.

Any questions?



Categorising your students:

Mode, level, length of year and price group



Mode (Annex H)

Mode:

- Determines which table to record a student in.
- Can be full-time, sandwich year out or part-time.

Full-time:

- Full-time fees are chargeable.
- Normally required to attend for at least **24 weeks in the year** of instance.
- Undertake study, tuition, learning in the workplace, work placement for at least **21 hours per week**.
- Can include time spent on a sandwich work placement, if the year doesn't meet the criteria to be a sandwich year out.

Table	Mode recorded
Courses	All
1: Full-time	Full-time
2: Sandwich	Sandwich year out
3: Part-time	Part-time
4: Year abroad	Full-time and Sandwich year out
5: Planning	All
6a-6c: Health	All

Mode (Annex H)

Sandwich year-out:

- A reduced fee is chargeable.
- The year of instance includes a period of work-based experience.
- Meets the definition given in the student support regulations OR is an Erasmus+ year abroad spent working.
- Meets the time-based criteria in Annex H.

Part-time:

- If a year doesn't meet the definitions for full-time or sandwich year out, it is considered part-time in HESES.

Note:

- Mode can change between years. More detail in the Annex.

Example: Table 1 Full-time

Table 1: Full-time counts of years of course

Price group: Annex G Length: Annex J Level: Annex I Fundability status: Annex F

Validation: OK First-stage credibility: OK First-stage

Price group	Length	Level	Years countable between 1 August 2019 and census date inclusive			Forecast of years countable after census date and 31 July 2020			Forecast of years not completed (negative values)			Estimated completed years academic year 2019-20 (Columns 1 + 2 + 3)		
			Home and EU	OfS-fundable (a)	Non-fundable (b)	Island and overseas (c)	Home and EU	OfS-fundable (a)	Non-fundable (b)	Island and overseas (c)	Home and EU	OfS-fundable (a)	Non-fundable (b)	Island and overseas (c)
A	Standard	UG	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	Long	PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGR		0.00	0.00			0.00	0.00			0.00	0.00	
		UG	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
B	Standard	PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGR		0.00	0.00			0.00	0.00			0.00	0.00	
	Long	UG	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
C1	Standard	PGR		0.00	0.00			0.00	0.00			0.00	0.00	
		UG	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	Long	PGT (Masters' loan)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGT (Other)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		PGR		0.00	0.00			0.00	0.00			0.00	0.00	
		UG	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Price groups (Annex G)

Years of instance are assigned to one of five **price groups** (A, B, C1, C2 or D).

First, there are **a number of specific cases** where we define the price group:

- sandwich years out
- clinical medical, dental and veterinary science
- pre-registration courses in nursing, midwifery and allied healthcare
- pre-registration courses in social work
- initial teacher training courses.

Second, we look at **the codes that describe the subject of the course**. The type of code used depends on the type of provider:

- Further education colleges – use **Learn Direct Classification System (LDCS)** codes.
- Other providers – use **Higher Education Classification of Subjects (HECoS)** codes.

Price groups – Codes

Colleges

- LDCS codes are associated with the learning aim of the course.
- Can look up on the ESFA's learning aims search – the courses table maps to price groups using this data.
- Unless indicated, sub-levels have the same price group as the 'parent' level.

All other providers

- HECoS codes determined by you.
- HESA has produced guidance for assigning HECoS codes to courses:
‘The qualification subject(s) must represent directly, or relate very closely to, the wording on the qualification’s official certificate of award. More than three qualification subjects would generally be regarded as exceptional.’

Price groups – other notes

- Years of instance can be split between price groups, if the course is associated with two (or more) HECoS or LDCS codes.
- Students are split between price groups reflecting how much activity they do in each, **based on the course as a whole**.
- Each year would have the same split of price groups.

Example

BSc physics with maths, associated with two HECoS codes:

- 100425 (physics) – maps to price group B, 60 per cent of activity.
- 100403 (mathematics) – maps to price group C2, 40 per cent of activity.

Each student full-time equivalence (FTE) would be split between the two price groups when entered in the HESES tables.

‘Length’: Standard / long years



Full-time students:

A long year is where a student is **in attendance for 45 weeks or more** in the year of instance.

Some restrictions:

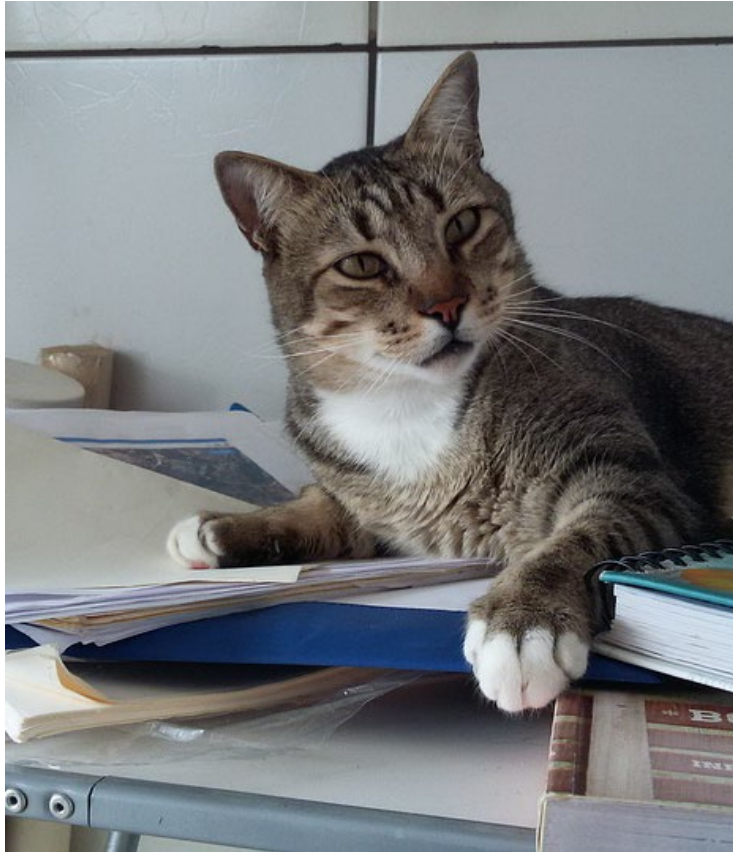
- periods of work experience don't count
- sandwich years don't count
- (usually) foundation degrees don't count.

If not a long year, it's a standard-length year.

Part-time students:

Depends on the length of the equivalent full-time course.

Level of study



UG – Undergraduate

PGT – Postgraduate taught:

- normal entry requirement is a degree level qualification
- three sub-levels: PGT (UG fee), PGT (Master's loan), PGT (Other).

PGR – Postgraduate research:

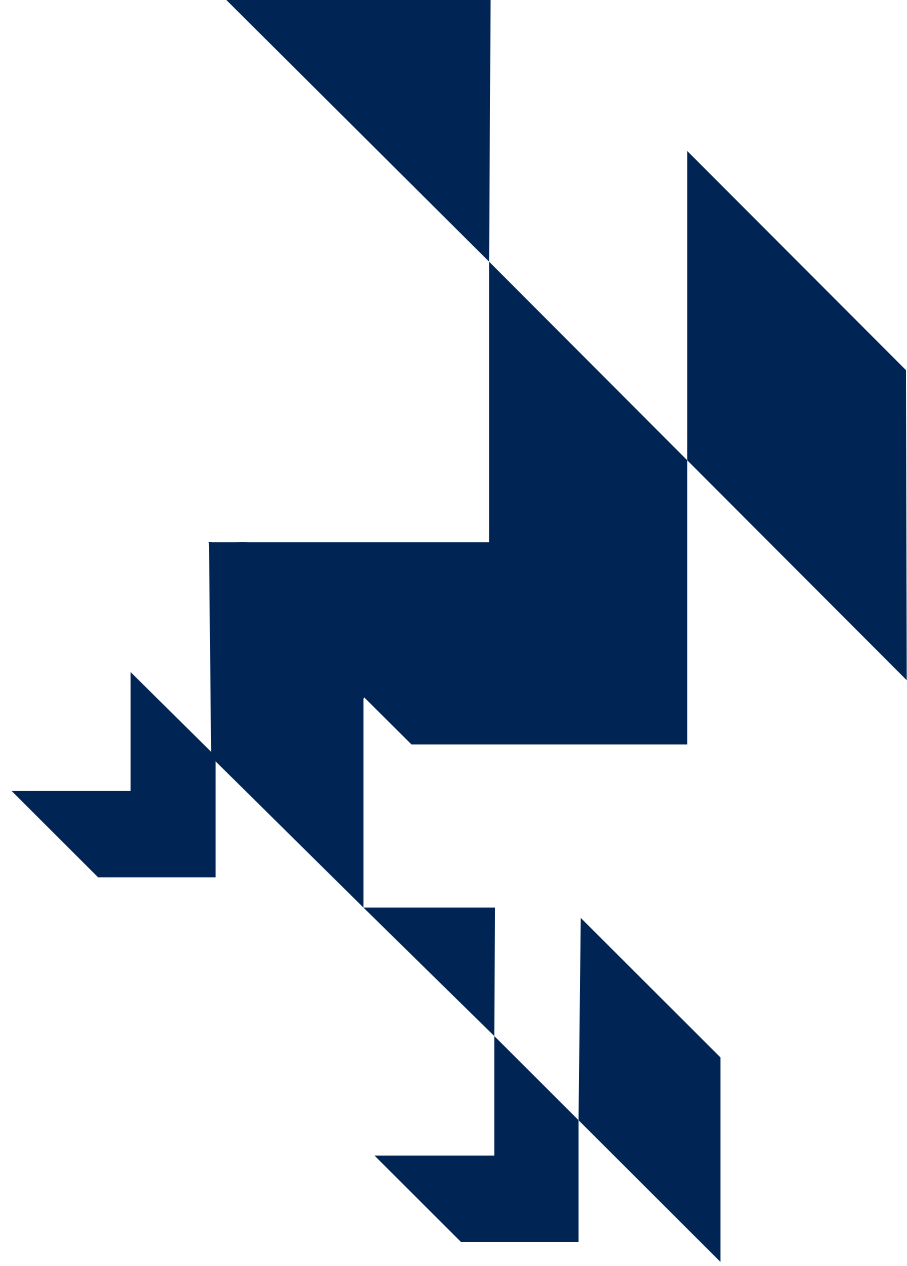
- qualification aim is a research-based higher degree.

Any questions?

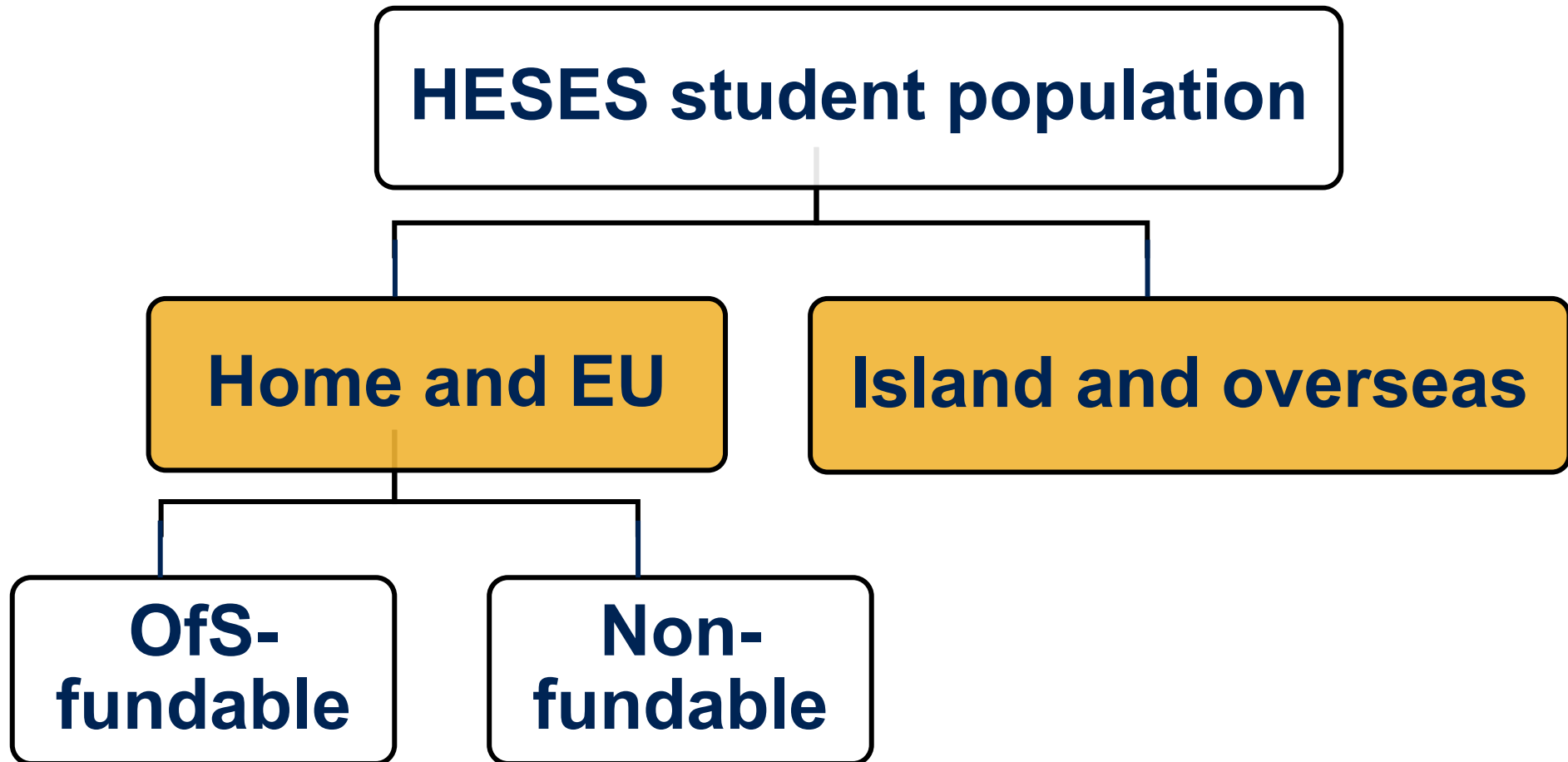


Categorising your students:

**Residential and fundability
status, new entrants**



Residential / fee status (Annex F)



Residential / fee status - definitions



Home and EU:

- Defined by the fee regulations.

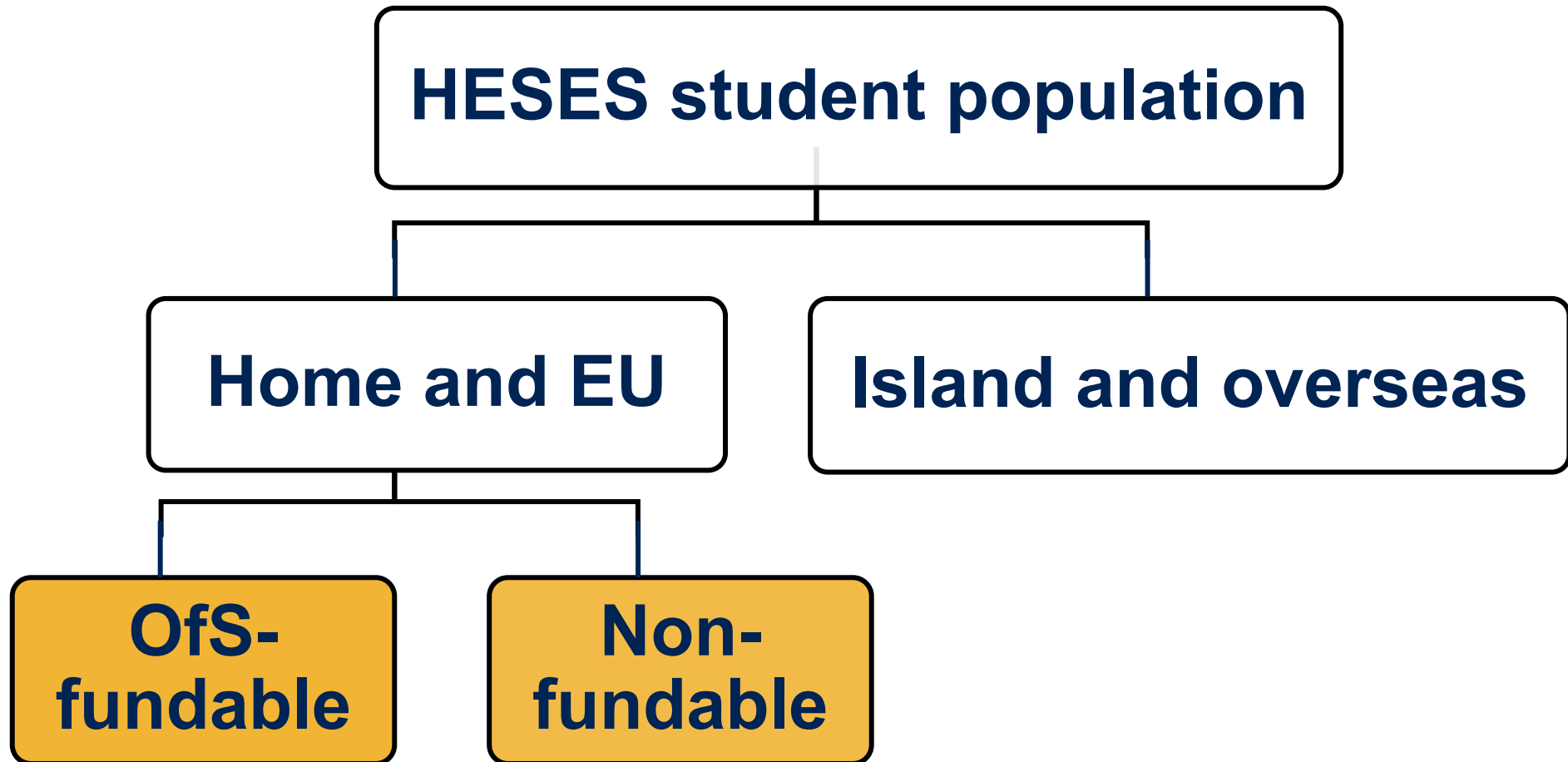
Island and overseas:

- Generally those from the Channel Islands or the Isle of Man or from outside the EU or specified territories.
- Not included in funding allocations.

Note:

- See HESES20 Annex F for further details.
- The HESES guidance is NOT definitive – refer to the Fee regulations as well.

Fundability status (Annex F)



Fundability status – fundable or non-fundable?

OfS-fundable:

- Home and EU students **unless** they're in one of the categories below.

Non-fundable categories:

- postgraduate research (PGR) students
- initial teacher training (leading to QTS/EYTS) and INSET students
- pre-registration courses for nursing, midwifery and allied health professions
- certain courses commissioned and funded by an NHS organisation
- PGT students funded by another EU public source
- students on closed courses (**not** students on apprenticeships).
- students aiming for equivalent or lower qualifications (ELQs), unless exempt.

Fundability status: ELQs

Equivalent or lower qualifications:

- When students are aiming for a qualification that is at the same level (or lower) than one they have already achieved.
- Generally these are non-fundable, but there are some exemptions. See HESSES20 Annex F for the full list, but examples are:
 - foundation degrees
 - PGCEs
 - students in receipt of Disabled Students' Allowances.
 - A number of health-related courses.
- If we don't know a student's prior qualifications, treat them as aiming for an ELQ. (so would be non-fundable, unless exempt).

Fundability status: qualification level

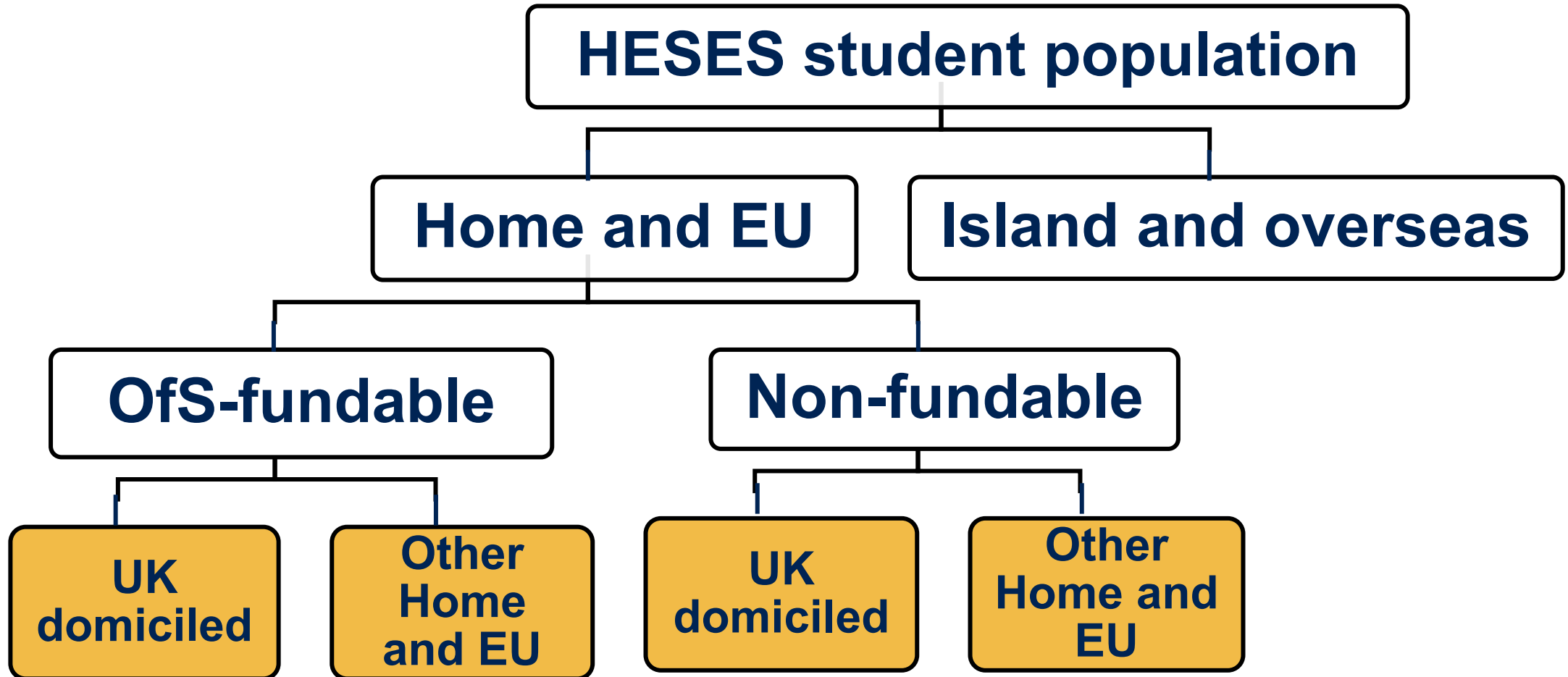
Typical higher education qualification	Framework for Higher Education Qualifications (FHEQ) level
Master's degrees (MA, MSc)	7
Integrated master's degrees (MEng)	
Postgraduate diplomas	
Postgraduate Certificate in Education (PGCE)	
Bachelor's degrees with honours	6
Bachelor's degrees	
Graduate diplomas	
Foundation degrees	5
Diplomas of Higher Education (DipHE)	
Higher National Diplomas (HND)	
Higher National Certificates (HNC)	4
Certificates of HE (CertHE)	

Caution:

This is not meant to be a complete list of higher education qualification levels.

See HESES20 guidance for further information.

Domicile (Annex F)



Domicile

Domicile is only entered on Table 5 (and the courses table for colleges only) and shares a definition with the **ILR/HESA DOMICILE field**:

- ‘the country code of the student's permanent home address prior to entry to the course. It is not necessarily the correspondence address of the student.’

Applies to home and EU students only. Can be:

- UK-domiciled:
 - entitled to pay Home and EU fees and
 - country of domicile = England, Wales, Scotland, Northern Ireland, UK not otherwise specified
- Other.

New entrants

Table 5 also identifies how many of your students are ‘**new entrants**’

A student can be counted as a new entrant when:

- they first generate a countable year for that instance
- they have not been active at the **same broad level** (UG, PGT, PGR) **at the provider** in either of the **two previous academic years**.

This does not include students repeating a year but can include students entering directly onto the second or subsequent years of a course.

Any questions?



What we have covered today



- Who should be included in the HESES survey.
- How to categorise students by mode, level of study and subject.
- How to categorise your students by residential and funding status.
- How to determine which of your students are 'new entrants'.

Next webinar

1330 on Monday 5 October 2020

Identifying and counting students to be included in HESES20

This webinar will cover:

- how to count student years
- how to make forecasts of non-completion and full-time equivalence (FTE)
- how to complete the healthcare tables in HESES20.

How to find out more

Website: www.officeforstudents.org.uk/heses

Email: heses@officeforstudents.org.uk

YouTube: <https://www.youtube.com/officeforstudents>

Office for
Students

The logo for the Office for Students, featuring a dark blue square with a yellow square in the top right corner containing the letters 'OfS' in white.

OfS

Thank you for listening

Copyright ©

The copyright in this presentation is held either by the Office for Students (OfS) or by the originating authors. Please contact info@officeforstudents.org.uk for further information and re-use requests.