

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

HESES21 training

Categorising your students and important definitions

Roger Lear
Funding Officer

22 September 2021

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Webinar housekeeping

- Presenters
 - Host: Roger Lear (backup – Will Scott)
 - Q&A: Ross Lawlor
- Closed captions are available – click the CC icon
- A recording of this session will be available on the OfS website
- Intended audience: those new to HESES and those needing a refresher
- How to ask a question:
 - Please use Q&A rather than “chat” box
 - Use “chat” box if having connection difficulties
- Please let us have your feedback.

Other HESES21 webinars

- Introduction to OfS funding and HESES21:
1330 on Monday 20 September 2021
- **Categorising your students and important definitions:**
1330 on Wednesday 22 September 2021
- Identifying and counting students to be included in HESES21:
1330 on Monday 27 September 2021
- Submission and verification of HESES21 data return:
1330 on Wednesday 29 September 2021
- Hands-on workbook exercises and breakout groups:
1330 on Tuesday 5 October 2021 and 1330 on Thursday 7 October 2021
- More information available at www.officeforstudents.org.uk/events.

Supporting materials

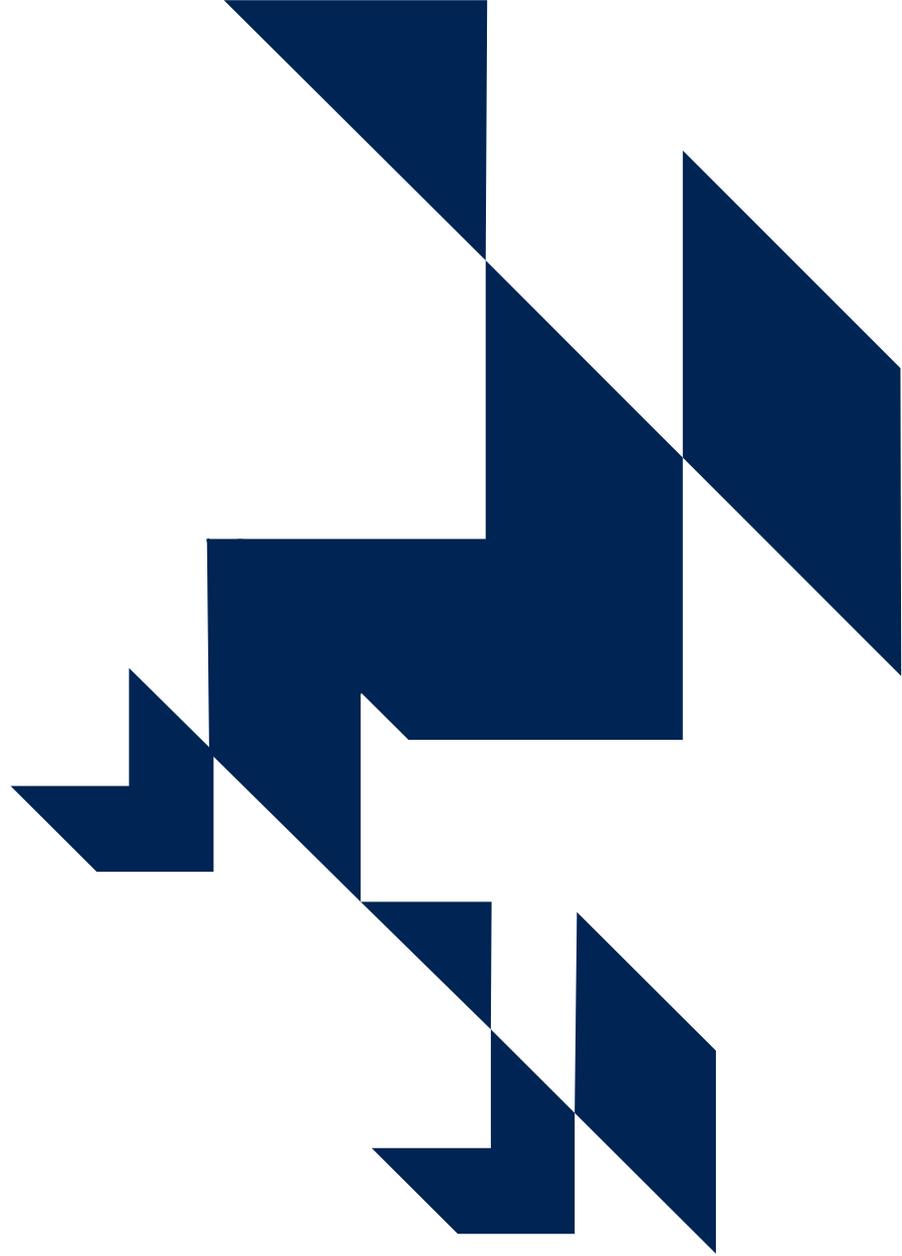
- A recording of this event and today's slides will be available from the OfS website at www.officeforstudents.org.uk/events
- Providers should also refer to www.officeforstudents.org.uk/heses
 - 'HESES21 – Higher Education Students Early Statistics survey 2021-22' publication
 - www.officeforstudents.org.uk/publications/heses21
 - 'How to complete the HESES21 workbook' publication
 - HESES videos on the OfS YouTube page: <https://www.youtube.com/officeforstudents>.
- Overview of OfS funding
 - 'Guide to funding 2021-22' publication
- Sign up for email alerts
 - www.officeforstudents.org.uk/sign-up-for-email-alerts

What we will cover today



- The HESES21 workbook
- The HESES21 population
- Categorising your students
 - mode
 - level of study
 - length of year
 - price group
 - fundability status
 - domicile
 - new entrants.

The HESES21 workbook



The HESES21 workbook

HESES21

Higher Education Students Early Statistics Survey 2021-22

Provider: A Higher Education Provider

UKPRN: 00000000

Workbook information

Date workbook submitted: Not yet submitted

Submission number: Not yet submitted

Deadline: Thursday 9 December 2021

HESES template version: 1.0

Template notes:

Validation check: No validation errors

First-stage credibility check: No first-stage credibility warnings

Comparison table highlighting: No comparison table highlighting

Guidance

Several documents are available that will be useful to refer to when completing the HESES21 workbook.

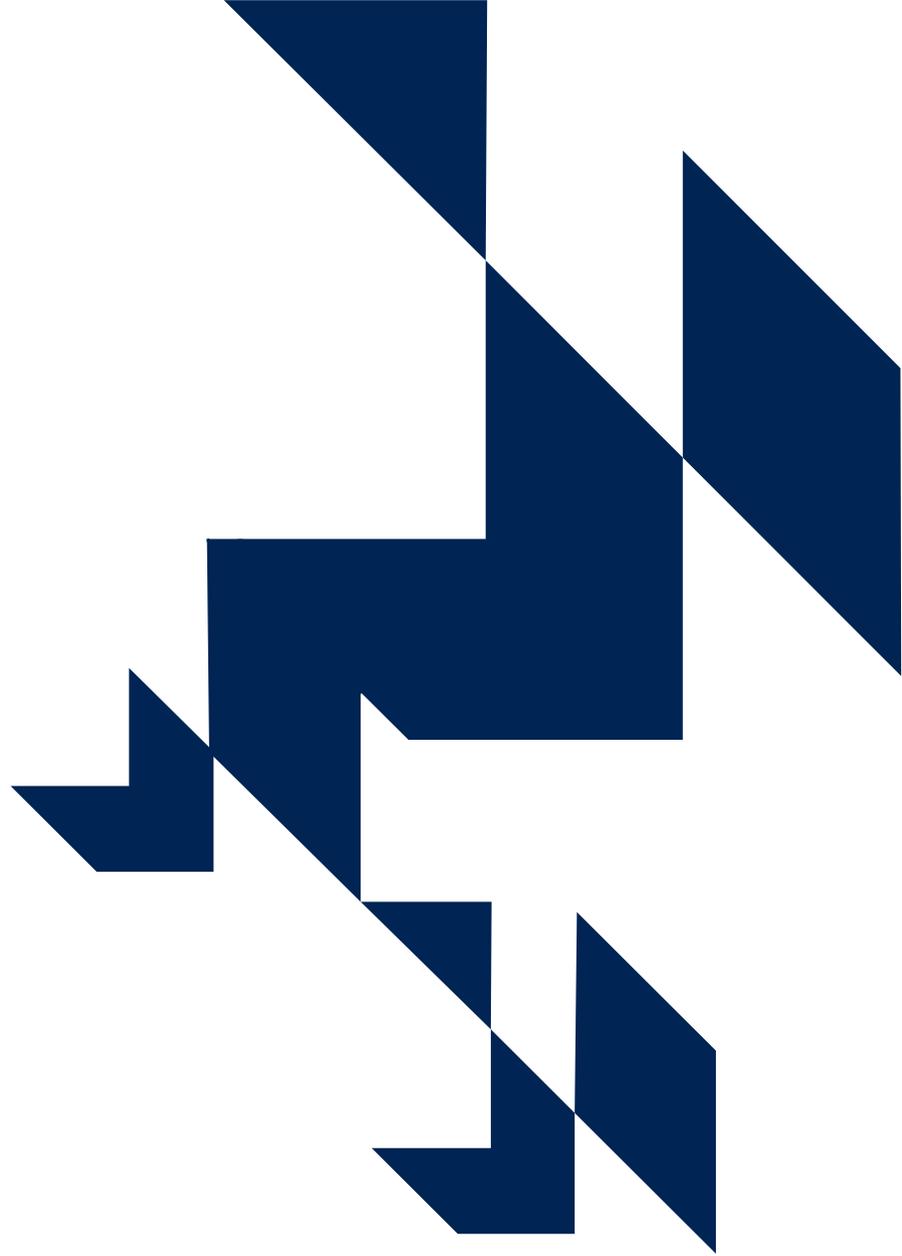
These include:

- HESES21 guidance
- 'Completing the HESES21 workbook'
- Appendices 1-5, which include information on workbook submission, validation and credibility checks, comparison tables, and funding modelling tables

What does the HESES21 workbook do?

- Gives an early indication of the number of higher education students studying in the academic year 2021-22
- It does this by:
 - **Categorising** students (today's webinar), and then
 - **Counting** them in their different categories (next webinar)

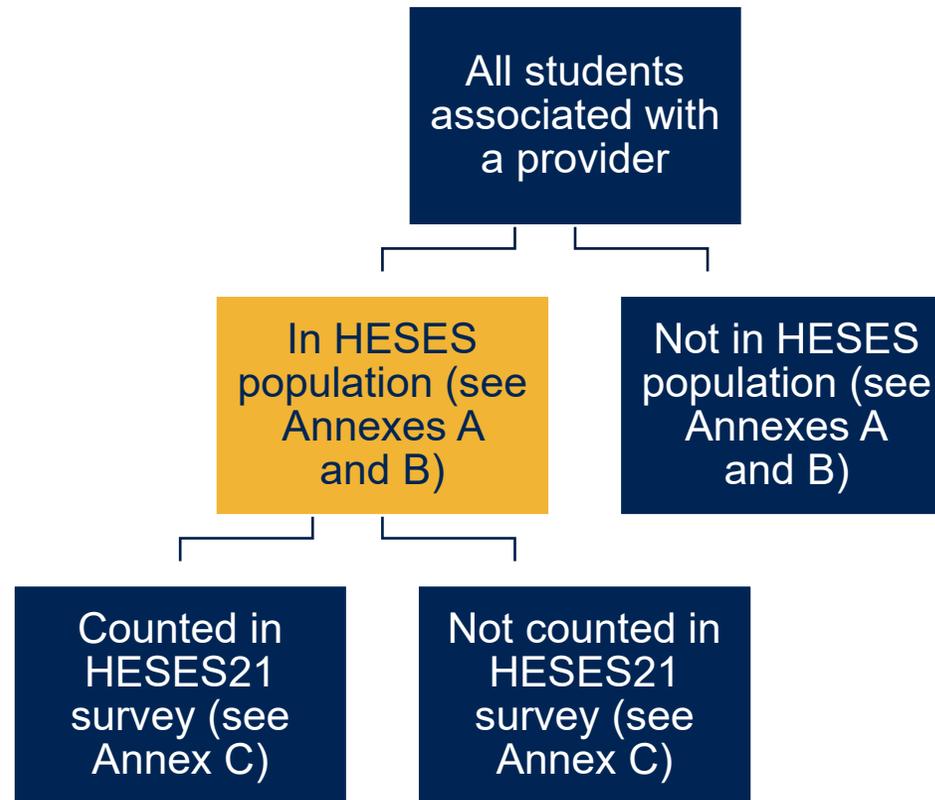
The HESES21 population



What is recorded in HESES?

- HESES counts ‘**years of instance**’
- Definition: an **instance** - a coherent engagement with a provider by a student aiming towards the award of one or more qualifications, or of credit
 - usually several years long but could just be one year (e.g. postgraduate awards) or less
 - progressing from one related course to another is usually considered to be one instance e.g. Foundation degree to BSc
- Counting years of instance is not the same as student headcount
 - that would distort part-time study activity – more on this in the next webinar (FTE)
 - possible for one student to be generate more than one year of instance (although this is rare and limitations may apply: see the HESES guidance).

Working out who to include in HESES21



Who is included in the HESES21 population?

- Students must be:
 - aiming for a **recognised higher education** qualification
 - or for higher-education-level credit that can be counted towards one
 - **registered** with a provider and actively pursuing studies in 2021-22 academic year
 - spending no more than half the active study for their whole instance outside the UK
- Note:
 - HESES21 counts **all** years of instance that **start** in the 2021-22 academic year, not just those starting their courses in 2021-22.

Definition of recognised higher education

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

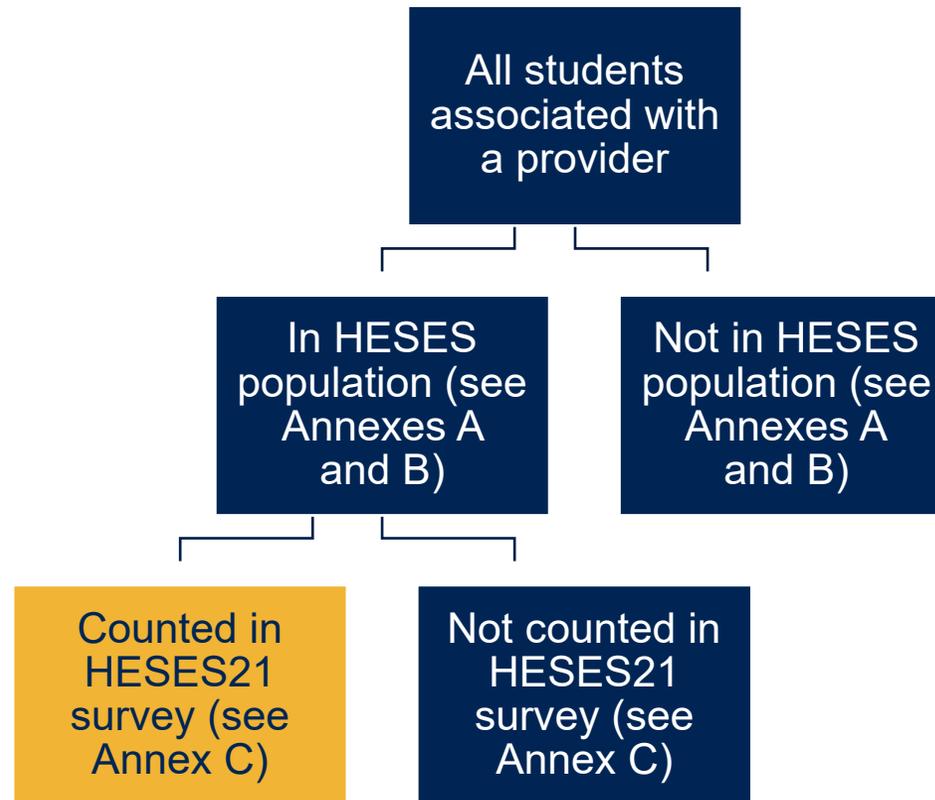
- a course that is designated under the Education (Student Support) Regulations 2011
- a ‘course of higher education’ as defined in Schedule 6 of the Education Reform Act 1988, other than one leading to a qualification in the Register of Regulated Qualifications.

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.

HESES21 guidance document – annex B

Working out who to include in HESES21



Which years of instance to count in HESES21

- To be counted, years of instance for 2021-22 must meet all these criteria:
 - A fee must be charged – see Annex C for more detail
 - The full-time equivalence (FTE) must be at least 0.03
 - The student is not “writing-up” throughout the entire year
 - The student has not withdrawn (and is not forecast to withdraw), within two weeks of starting their instance.
- There will be more about **how** to count years of instance in the next webinar.

Who is included in the HESES21 population?

- Students must be:
 - aiming for a **recognised higher education** qualification or higher-education-level credit that can be counted towards one
 - **registered with a provider and actively pursuing studies in 2021-22 academic year**
 - spending no more than half the active study for their whole instance outside the UK
- Note:
 - HESES21 counts **all** years of instance that **start** in the 2021-22 academic year, not just those starting their courses in 2021-22.

Students “registered with a provider”

- Students should only be returned in HESES21 (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 registering provider is the one that has tuition fees paid to them (usually by the Student Loans Company)
 - for students on apprenticeships, this is the same as the **lead provider** for the **Education and Skills Funding Agency (ESFA)** i.e. 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.

Validation and sub-contracting

- Where providers are in a partnership, this could be:
 - **Validation arrangement** (awards made are “validated” by another provider)
 - students are registered with the teaching provider which will report them in its data returns
 - **Sub-contractual (‘franchise’) arrangement**
 - students are **not** registered by the teaching provider
 - the teaching provider is teaching on behalf of the registering provider
 - in this case the teaching provider does **not** report students in their data returns
- For further information, please see the HESES guidance (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
- They are reported in HESES the same as any other student.

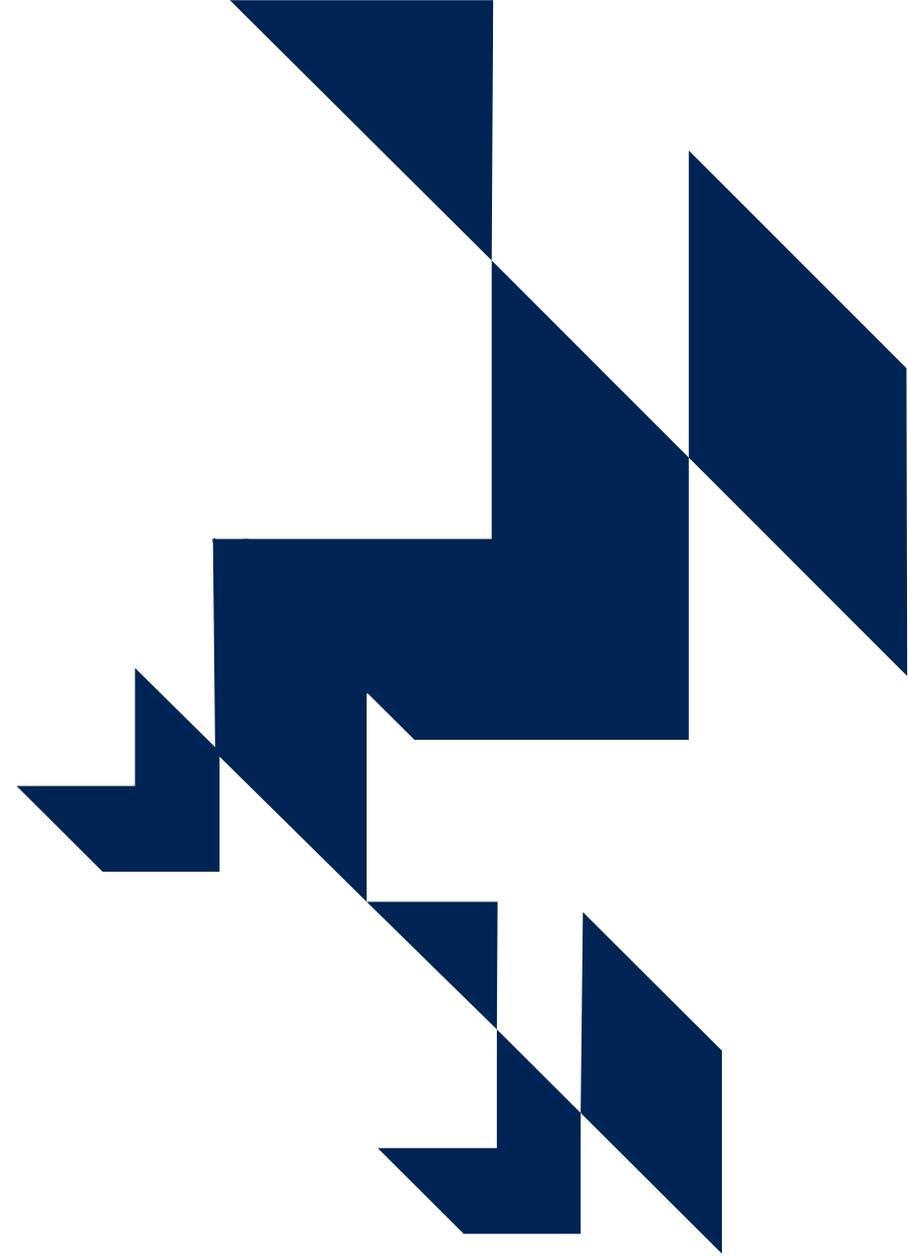
Any questions?

Please use the Q&A box



Categorising your students:

Mode, price group, length of year and level



Student categories in the HESES workbook

- At the highest level, categorized by **mode** on separate tables in the workbook



Information	Courses	1 Full-time	2 Sandwich	3 Part-time	4 Year abroad	5 Planning	6a Health full-time	6b
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(The courses table is for further education and sixth form colleges and academies only and we will talk about this in the next webinar.)

Mode (Annex H)

- Determines which table to record a student on in the HESES workbook
- Can be
 - full-time: table 1
 - sandwich year out: table 2
 - part-time: table 3
- Mutually exclusive
- Other tables shown here analyse the same data in different ways – more on these shortly.

Table name	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

* Note: Courses table for Further Education and sixth-form colleges and academies only.

Mode: full-time (table 1)

- Full-time fees are chargeable
 - Fees can be waived, but there are restrictions on this (see Annex H)
- Normally required to attend for at least **24 weeks in the year** of instance
 - at the provider themselves or somewhere else (e.g. sub-contracted location)
- 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.

Mode: sandwich year out (table 2)

- 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+ scheme year abroad spent working
- Meets the time-based criteria in Annex H
 - No more than 10 weeks of full-time study **OR**
 - The total of all the time spent not in full-time study (e.g. work placement) goes over 30 weeks
- Examples given in Annex H.



Mode: sandwich year out - example

- Year 1
 - 15 weeks of full-time study + 16-week placement
 - Mode is **full-time** because:
 - Full-time fees are chargeable
 - required to attend for at least 24 weeks
 - **study**, tuition, learning in the workplace, **work placement** for at least 21 hours per week
- Year 2
 - 15 weeks of full-time study + 16-week placement
 - Mode is **sandwich year out** because:
 - total time so far **not** in full-time study > 30 weeks (two 16-week placements = 32 weeks).



Mode: part-time (table 3)

- If a year doesn't meet the definitions for full-time or sandwich year out, then for HESES purposes it is considered **part-time**
- Note on apprenticeships:
 - Normally part-time
 - Can be full-time in certain circumstances but please check with us
 - Only time spent in study or learning in the workplace that directly contributes to their recognised higher education qualification is counted towards a student's activity.

Mode: things to note

- Mode can change between years
 - More detail and examples are in Annex H
- HESA full-time may not be the same as HESES full-time
 - Example: 15 month studying at full-time intensity
 - Second year of instance (the last 3 months) < 24 weeks
 - HESES: part-time, but
 - HESA: full-time
 - Refer to the Annex H in the guidance.

Any questions?

Please use the Q&A box



Student categories in the HESES workbook

- At the highest level, categorised by **mode** on separate tables in the workbook:
 - full-time – table 1
 - sandwich year out – table 2
 - part-time – table 3
- Students are further categorised by:
 - price group
 - length of year
 - level of study
 - fundability status
 - domicile.

Example: Table 1

A Higher Education Provider

Validation: OK Validation: OK Validation: OK Validation: OK

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

Price group: Annex G Length: Annex J Level: Annex I Column 3 Fundability status: Annex F

Home fee Home fee Home fee Home fee

Price group	Length	Level	Home fee			Home fee			Home fee			Home fee			
			OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	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	0.00	
		PGT (UG fee)													
		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	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	0.00	
		PGR		0.00	0.00		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	
	B	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	
			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		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		
PGR				0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00	
C1.1		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		
	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		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		
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00	

Price groups – what are they?

Years of instance are assigned to one of six **price groups** reflecting the costs associated with particular subjects:

- **A:** clinical years of medical, dental and veterinary courses
- **B:** laboratory-based subjects e.g. chemistry, engineering, certain health care courses
- **C1.1:** strategically important intermediate cost subjects e.g. pre-registration courses in nursing, computing and information technology, and archaeology
- **C1.2:** other intermediate cost subjects covering provision in performing and creative arts and media studies
- **C2:** subjects with a laboratory, studio or fieldwork element e.g. geography, languages, psychology
- **D:** classroom-based subjects e.g. politics, economics, law, English, history
- These are used in calculating grants for various funding allocations

Price groups – choosing the correct price group

- How are courses assigned to price groups?
 - “specific cases”
 - according to a coding system
 - **FECs:** Learn Direct Class System (LDCS)
 - **Other providers:** Higher Education Classification of Subjects (HECoS) codes
 - Full description in the HESES guidance (Annex G).
- Important to get right
 - may be queried in HESES data verification

Price groups – specific cases

There are **a number of specific cases** where the price group is pre-defined:

- sandwich years out
- clinical years of medical, dental and veterinary science courses
- pre-registration courses in nursing, midwifery and allied healthcare
- pre-registration courses in social work
- initial teacher training courses
- full details in Annex G of the HESES guidance
- If not a special case, use:
 - LDCS (FECs)
 - HECoS (others)

Price groups for further education colleges: LDCS Codes

- These are associated with the recorded **learning aim** of the course
- The Courses table maps learning aims to price groups using this data

Learning aim reference	Course title	Price group 1	Price group 1 proportion
00100633	HNC in Engineering (Mechanical/Manufacture)	B	100%
00239642	BSc (Hons) in Applied Animal Science	B	100%
00300146	BA (Hons) in Child and Youth Studies (Top-Up)	D	100%
60322767	BTEC Higher National Certificate in Sport & Exercise Science	C2	100%

- A mapping of LDCS codes to price groups is also found in Annex G
- You can look up learning aims on the ESFA's search website:
 - <https://findalearningaimbeta.fasst.org.uk/>
 - For **new courses**, get a learning aim reference from the ESFA **as soon as you can**
 - please let us know if there is a delay.

Price groups for other providers – HECoS codes

- HECoS codes are administered by the Higher Education Statistics agency (HESA)
- HESA has produced guidance for assigning HECoS codes to courses:
 - www.hesa.ac.uk/support/documentation/hecos
- HECoS codes determined by providers.
 - ‘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 group splits

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

Price group splits - example

BSc physics with maths (three-year course): associated with two HECoS codes:

- 100425 (physics) – maps to price group B
- 100403 (mathematics) – maps to price group C2
- Course breakdown:
 - Year 1 – physics 60 per cent, maths 40 per cent
 - Year 2 – physics 40 per cent, maths 60 per cent
 - Year 3 – physics 80 per cent, maths 20 per cent
 - **Average** = physics 60 per cent, maths 40 per cent
- In HESES, **all years of instance** would be recorded with this 60-40 split.

Example: Table 1

A Higher Education Provider

Validation: OK Validation: OK Validation: OK Validation: OK

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

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

Price group	Length	Level	Home fee			Home fee			Forecast of years not completed (negative values)			Estimated year 2021		
			OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	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	0.00
		PGT (UG fee)												
		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	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	0.00
		PGR		0.00	0.00		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	0.00
	Long	PGT (UG fee)												
		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	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	0.00
		PGR		0.00	0.00		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	0.00
		PGT (UG fee)												
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	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	0.00
		PGR		0.00	0.00		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	0.00
		PGT (UG fee)												
		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	0.00
C1.1	Standard	PGT (Other)	0.00	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		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	0.00
	Long	PGT (UG fee)												
		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	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	0.00

Length: standard and long years



Long years

- Full-time students - 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
 - Part-time students - depends on the length of the equivalent full-time course: see annex J for full details

Standard-length years

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

Example: Table 1

A Higher Education Provider

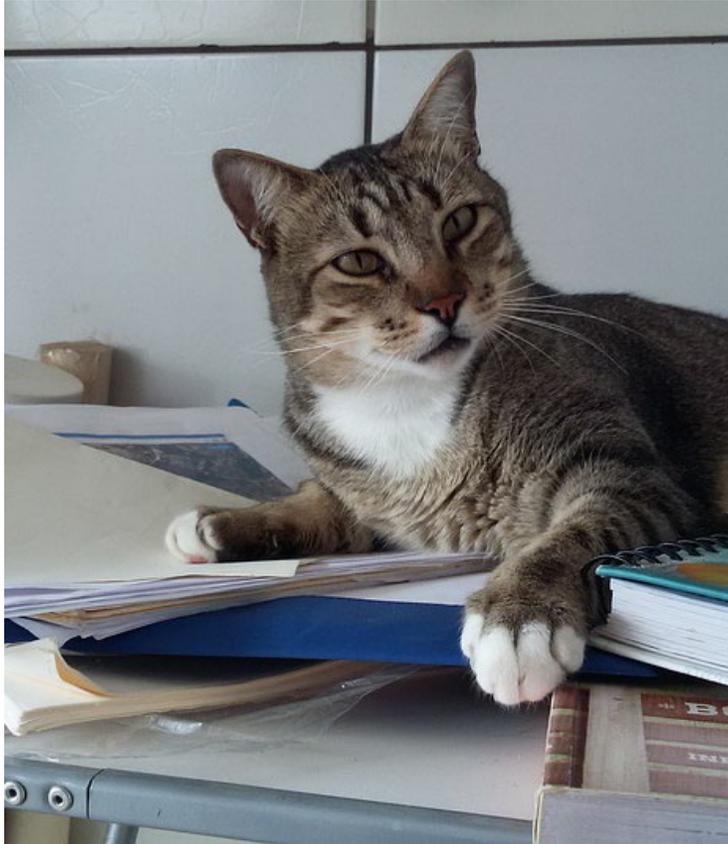
Validation: OK Validation: OK Validation: OK Validation: OK

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

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

Price group	Length	Level	Home fee			Home fee			Forecast of years not completed (negative values)			Home fee		
			OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	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	0.00
		PGT (UG fee)												
		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	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	0.00
		PGR		0.00	0.00		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	0.00
		PGT (UG fee)												
		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	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	0.00
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00
B	Standard	UG	0.00	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	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	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	0.00
		PGR		0.00	0.00		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	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	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	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	0.00
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00
C1.1	Standard	UG	0.00	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	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	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	0.00
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00

Level of study – undergraduate and postgraduate



- **UG – Undergraduate**
 - no degree level entry requirement
- **PGT – Postgraduate taught**
 - normal entry requirement is a degree level qualification
 - three sub-levels:
 - PGT (UG fee)
 - PGT (Masters' loan)
 - PGT (Other)

PGR – Postgraduate research

- qualification aim is a research-based higher degree.

Level of study – postgraduate taught (PGT)

PGT – Postgraduate taught

- normal entry requirement is a degree level qualification
- three sub-levels:
 - **PGT (UG fee)**: only some PGCE, architecture and pre-registration nursing, midwifery and allied health profession (NMAH) courses
 - **PGT (Masters' loan)**: students on a **course** that's eligible for masters' loan
 - **PGT (Other)**: not in the other categories
- Please refer to the HESES guidance (Annex I).

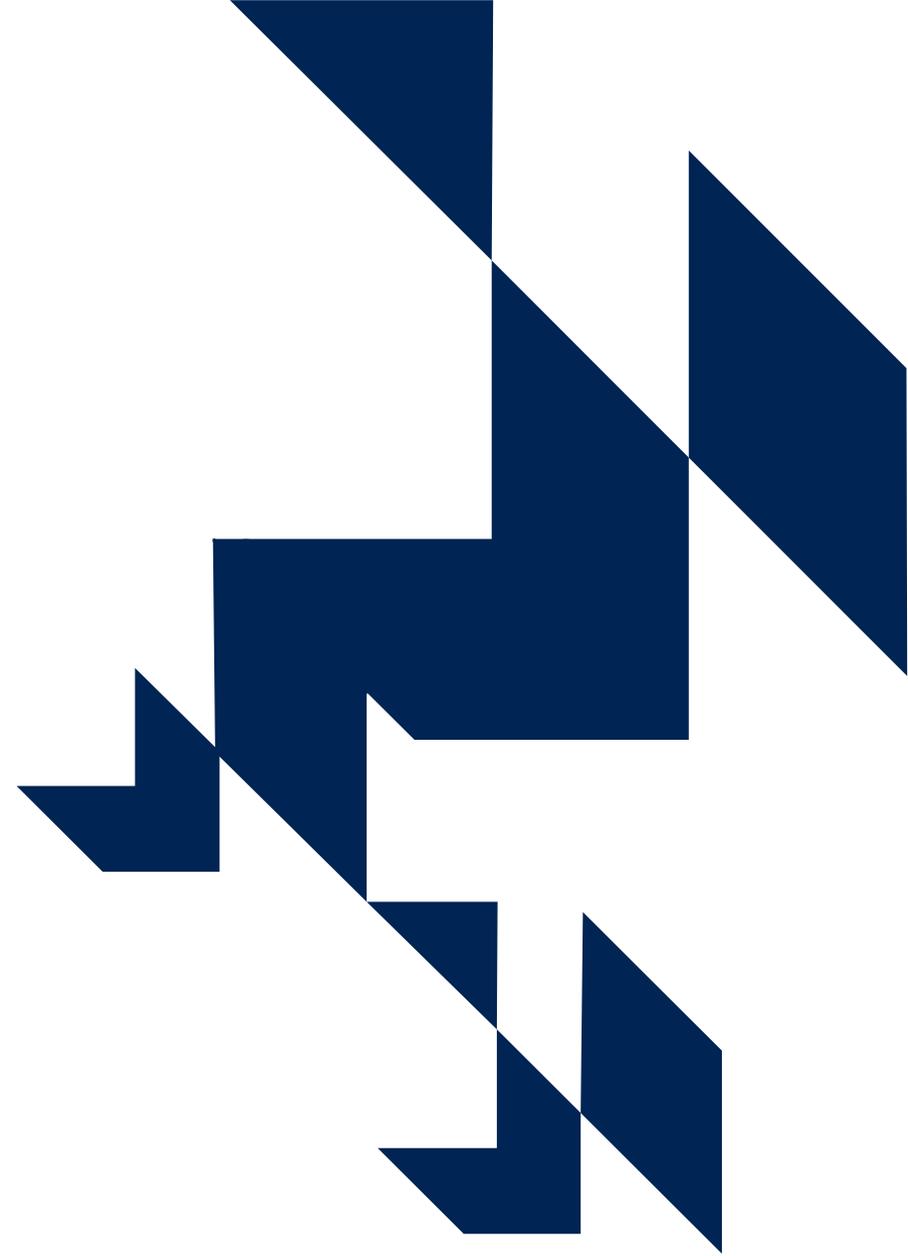
Any questions?

Please use the Q&A box



Categorising your students:

Fundability status and domicile
New entrants
Other classifications



Example: Table 1

A Higher Education Provider

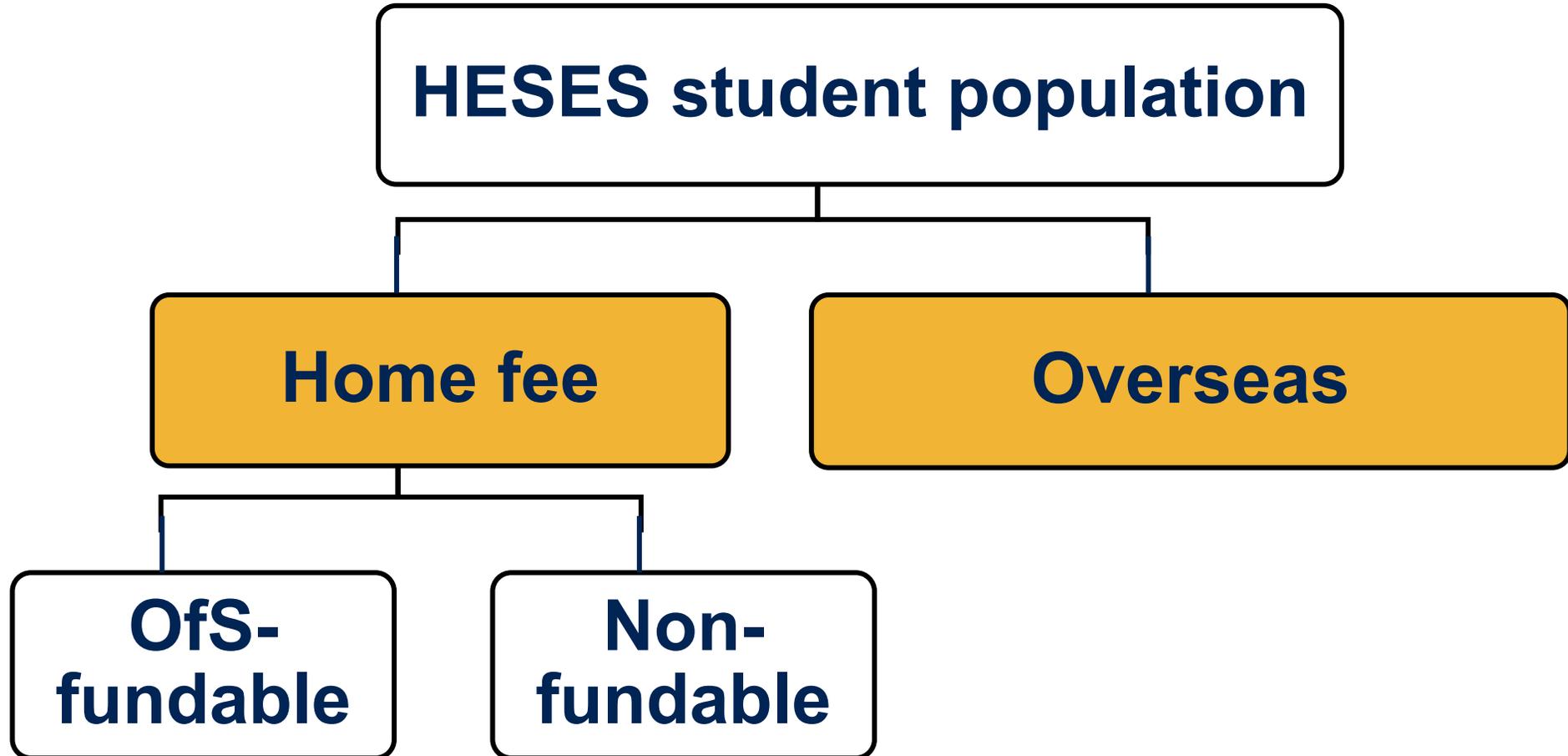
Validation: OK Validation: OK Validation: OK Validation: OK

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

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

Price group	Length	Level	Home fee			Home fee			Forecast of years not completed (negative values)			Estimated cost year 2021-22			
			OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	Overseas (c)	OfS-fundable (a)	Non-fundable (b)	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	0.00	0.00
		PGT (UG fee)													
		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	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	0.00	0.00
		PGR		0.00	0.00		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	0.00
	B	Standard	UG	0.00	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	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	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	0.00
			PGR		0.00	0.00		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	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	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	0.00	
PGR				0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00	
C1.1		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	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	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	0.00	
	PGR			0.00	0.00		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	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	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	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	0.00	
		PGR		0.00	0.00		0.00	0.00		0.00	0.00		0.00	0.00	

Fundability status (Annex F) - fees



Fundability status (Annex F) - definitions



Home fee – as defined by the fee regulations

- Now includes those from the Crown Dependencies (Channel Islands and the Isle of Man)
- May also include some EU students covered by the withdrawal agreements.

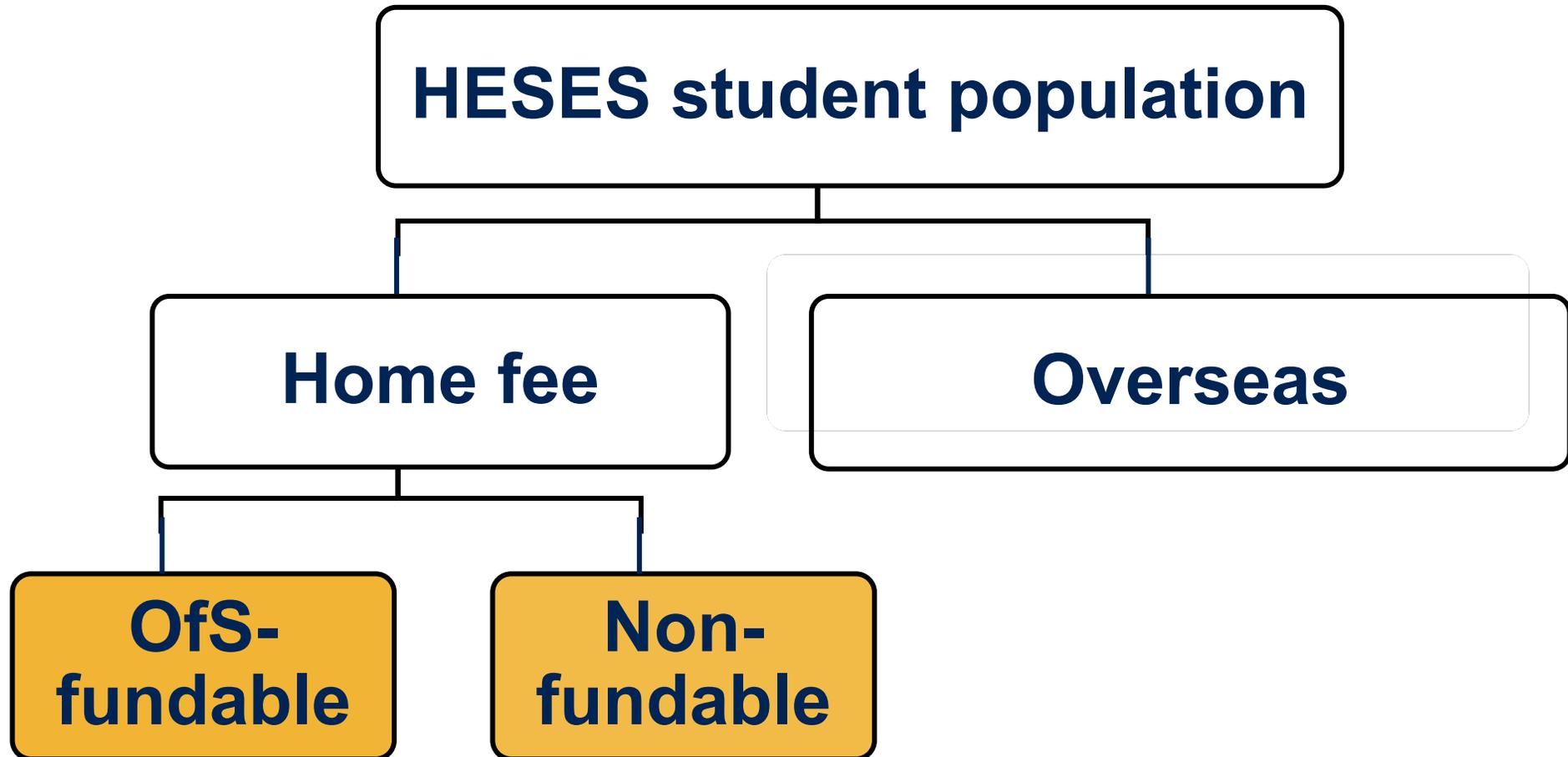
Overseas

- Those falling outside the definition for Home fee status
- Not included in funding allocations but we still count them

See Annex F in the HESES21 guidance

- **Note:** the HESES21 guidance is **not** definitive – refer to the fee regulations.

Fundability status (Annex F)



Fundability status – fundable or non-fundable?

OfS-fundable:

- Home fee students **unless** they are in one of the categories below.

Non-fundable categories (see annex F for the full list):

- postgraduate research (PGR) students
- initial teacher training (leading to QTS/EYTS) and INSET students
- certain courses commissioned and funded by an NHS organisation
- PGT students funded by another public source
- students on closed courses (**not** students on apprenticeships)
- students aiming for equivalent or lower qualifications (ELQs), unless exempt
- some health-related courses started before funding was transferred from DHSC

Fundability status: ELQs

Equivalent or lower qualifications (ELQ):

- When students are aiming for a qualification that is at the same level (or lower) than one they have already achieved
- **Generally non-fundable** but there are some exemptions. See HESES21 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 you don't know a student's prior qualifications, treat them as aiming for an ELQ. (i.e. non-fundable, unless exempt).

Fundability status: qualification level & ELQs

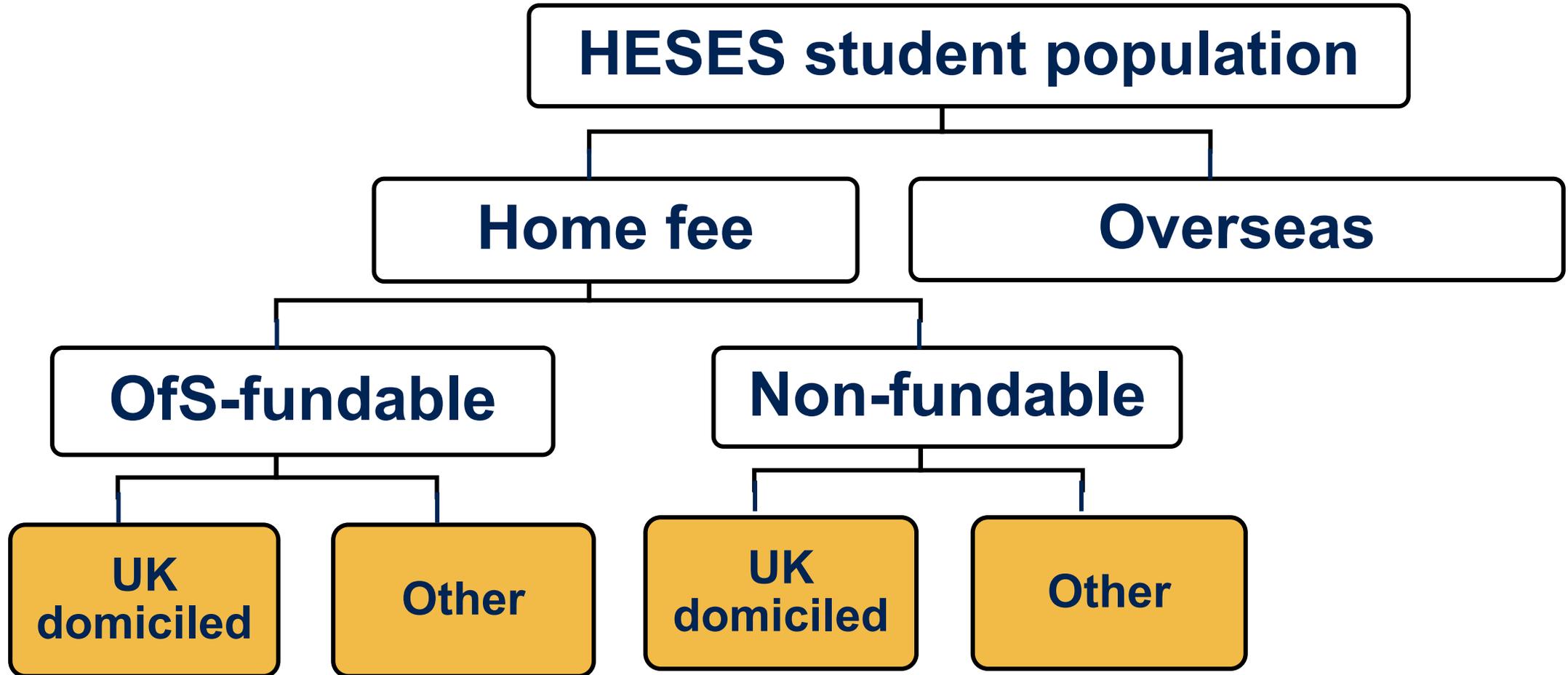
Typical higher education qualification	Framework for Higher Education Qualifications (FHEQ) level
Master's degrees (MA, MSc)	7
Integrated master's degrees (MEng)	
Postgraduate diplomas	
Postgraduate Certificate in Education (PGCE)	
Bachelor's degrees with honours	6
Bachelor's degrees	
Graduate diplomas	
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 annex F of the HES21 guidance for further information.

Domicile (Annex F)



Domicile

- 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 fee students only** and can be:
 - **UK-domiciled**
 - entitled to pay Home fees **and**
 - country of domicile = England, Wales, Scotland, Northern Ireland, UK not otherwise specified
 - **Other**
- Domicile is only entered on **Table 5** (and on **the Courses table** for FECs only)

Table 5 – the Planning table

Table 5: Further student breakdowns for planning purposes

A Higher Education Provider

		Validation: OK First-stage credibility: OK					Validation: OK First-stage credibility: OK					Validation: OK First-stage credibility: OK					
		Section A: All years										Section B: New entrants					
		Column 1 Years countable between 1 August 2021 and census date inclusive					Column 2 Forecast of years countable after census date and before 1 August 2022 (as entered in Column 2 of Tables 1, 2 and 3)					New entrants included in Section A of this table					
		Home fee					Home fee					Home fee					
		(a) OfS-fundable UK-domiciled		(b) Non-fundable UK-domiciled		(c) Overseas	(a) OfS-fundable UK-domiciled		(b) Non-fundable UK-domiciled		(c) Overseas	(a) OfS-fundable UK-domiciled		(b) Non-fundable UK-domiciled		(c) Overseas	
		(i)	(ii)	(i)	(ii)		(i)	(ii)	(i)	(ii)		(i)	(ii)	(i)	(ii)		(i)
Mode	Level																
Full-time and sandwich year out	UG	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGT (UG fee)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGT (Masters' loan)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGT (Other)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGR			0	0	0			0	0	0			0	0	0	0
Part-time	UG	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGT (UG fee)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGT (Masters' loan)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGT (Other)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	PGR			0	0	0			0	0	0			0	0	0	0
All modes	UG	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	All PG levels	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Table 5 section B – new entrants

- Table 5 section B identifies ‘**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
 - Full details in the HESES guidance (Annex C).

Other classifications

- **Table 4:** year abroad
- **Tables 6a-6c:** Health tables - more on these in the next seminar
 - full-time: table 6a
 - sandwich year out: table 6b
 - part-time: table 6c.

Table name	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

* Note: Courses table for Further Education and sixth-form colleges and academies only.

Any questions?

Please use the Q&A box



How to find further guidance

Further guidance on the topics covered today can be found in the HESES21 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 status or domicile	Annex F
New entrants	Annex C

What we have covered today



- The HESES21 workbook
- The HESES21 population
- Categorising your students
 - mode
 - level of study
 - length of year
 - price group
 - fundability status
 - domicile
 - new entrants.

Next webinar

1330 on Monday 27 September 2021

Identifying and counting students to be included in HESES21

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 HESES21.

How to find out more

Website: www.officeforstudents.org.uk/heses

Email: heses@officeforstudents.org.uk

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

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