

Office for
Students



2021-22 Individualised Learner Record (ILR) data checking tool

HESES21 comparison rebuild
instructions

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Contents

Summary	2
HESES21 tables recreated using 2021-22 ILR data	4
Courses table: Countable years of instance between 1 August 2021 and census date at course level	4
Table 1: Full-time counts of years of instance	4
Table 2: Sandwich year out counts of years of instance	5
Table 3: Part-time counts of years of instance and FTE	6
Table 4: Home fee undergraduate years abroad	6
Table 5: Further student analysis for planning purposes	7
Table 6a: Full-time counts of years of instance for home fee students on pre-registration health courses	7
Table 6b: Sandwich year out counts of years of instance for home fee students on pre-registration health courses	8
Table 6c: Part-time counts of years of instance and FTE for home fee students on pre-registration health courses	8
Funding tables	10
Table A: Summary of 2022-23 allocations	10
Table B: 2022-23 High-cost subject funding	10
Table C: 2022-23 Nursing, midwifery and allied health supplement	10
Table D: 2022-23 Overseas study programmes	11
Table E: 2022-23 Other high-cost targeted allocations	11
Table F: 2022-23 Student access and success	12

Summary

1. This document describes how the Higher Education Students Early Statistics (HESES) recreation data can be rebuilt from the HESES21 comparison individualised file.
2. The HESES21 comparison is formed of two files. These are:
 - a. HESES21 comparison workbook 'HES21_DCT_XXXXXXXX.xlsx'.
 - b. HESES21 comparison individualised file 'HES21_DCT_XXXXXXXX_IND.csv'.
3. Each section of this document details how to rebuild specific populations of students that appear on the tables in the HESES21 comparison workbook. These tables are listed below.

Worksheet	Title
1_Full_time	HESES21 recreated using 2021-22 ILR data Table 1: Full-time counts of years of instance
2_Sandwich	HESES21 recreated using 2021-22 ILR data Table 2: Sandwich year out counts of years of instance
3_Part_time	HESES21 recreated using 2021-22 ILR data Table 3: Part-time counts of years of instance and full-time equivalence (FTE)
4_Year_abroad	HESES21 recreated using 2021-22 ILR data Table 4: Home fee undergraduate years abroad
5_Planning	HESES21 recreated using 2021-22 ILR data Table 5: Further student analysis for planning purposes
6a_Health_full_time	HESES21 recreated using 2021-22 ILR data Table 6a: Full-time counts of years of instance for home fee students on pre-registration health courses
6b_Health_sandwich	HESES21 recreated using 2021-22 ILR data Table 6b: Sandwich year out counts of years of instance for home fee students on pre-registration health courses
6c_Health_part_time	HESES21 recreated using 2021-22 ILR data Table 6c: Part-time counts of years of instance and FTE for home fee students on pre-registration health courses
A Summary	2022-23 Grant tables Table A: Summary of 2022-23 allocations
B High-cost	2022-23 Grant tables Table B: 2022-23 High-cost subject funding
C NMAH supplement	2022-23 Grant tables Table C: 2022-23 Nursing, midwifery and allied health supplement
D Overseas	2022-23 Grant tables Table D: 2022-23 Overseas study programmes
E Other high-cost TAs	2022-23 Grant tables Table E: 2022-23 Other high-cost targeted allocations

Worksheet	Title
F Student access and success	2022-23 Grant tables Table F: 2022-23 Student access and success
G Parameters	2022-23 Grant tables Table G: 2022-23 Parameters in the funding models

4. This document was updated on 18 August 2022 when the HESES21 comparison workbook was revised to include funding modelled using 2021-22 ILR data.

HESES21 tables recreated using 2021-22 ILR data

Courses table: Countable years of instance between 1 August 2021 and census date at course level

5. For the population that appears in this table, the first filters to apply to the individualised file are:

HESEXCL = 0

HESREG = 1

6. To further filter these years of instance, the following fields can be used:

LEARNAIMREF

HESMODE

HESRESSTAT.

7. For example, to filter to full-time years of instance that are fundable and UK-domiciled for LEARNAIMREF = 00123456, then the filters to apply to the individualised file are as follows:

HESEXCL = 0

HESREG = 1

LEARNAIMREF = 00123456

HESMODE = FTS

HESRESSTAT = HOMEF_UK.

Table 1: Full-time counts of years of instance

8. For the population that appears in this table, the first filters to apply to the individualised file are:

HESEXCL = 0

HESMODE = FTS

9. Additional filters can be applied to specify years of instance in a particular cell, such as filtering by price group, length of year of instance, level of study, and residential and fundability status.

Derived field	Definition	Values and definitions
PRGA, PRGB, PRGC11, PRGC12, PRGC2, PRGD	Used to filter to a specific price group	PRGA ≠ 0 for price group A. PRGB ≠ 0 for price group B. PRGC11 ≠ 0 for price group C1.1. PRGC12 ≠ 0 for price group C1.2. PRGC2 ≠ 0 for price group C2. PRGD ≠ 0 for price group D.
LENGTH	Used to filter to the length of year of instance	LENGTH = S for students on a standard length of year of instance. LENGTH = L for students on a long length of year of instance.

Derived field	Definition	Values and definitions
HESLEVEL	Used to filter to the level of study	HESLEVEL = UG for students on an undergraduate course. HESLEVEL = PGT_UGF for students who are postgraduate taught and eligible under the undergraduate student support regime. HESLEVEL = PGT_ML for students who are on postgraduate taught courses that are eligible under the masters' loan arrangements. HESLEVEL = PGT_OTH for students who are on postgraduate taught courses that do not fall under the previous two categories. HESLEVEL = PGR for students who are on postgraduate research courses.
HESTYPE	Used to filter to the residential and fundability status of the year of instance	HESTYPE = HOMEF for Home fee OfS-fundable. HESTYPE = HOMENF for Home fee non-fundable. HESTYPE = ISOV for Overseas.
HESREG	Used to filter Column 1 and Column 2 years of instance	HESREG = 1 for Column 1. HESREG = 2 for Column 2.
HESCOMP	Used to filter the completion status of the year of instance	HESCOMP = 3 for Column 3 (non-completions). HESCOMP = 4 for Column 4 (completions).

10. For example, to filter to years of instance on this table that are fundable, in Column 1, and on a standard length year of instance of an undergraduate course, the filters to apply to the individualised file are the following:

HESEXCL = 0

HESMODE = FTS

LENGTH = S

HESLEVEL = UG

HESTYPE = HOMEF

HESREG = 1.

11. To count the years of instance that are in price group C1.1, sum the values of PRGC11.

Table 2: Sandwich year out counts of years of instance

12. For the population that appears in this table, the first filters to apply to the individualised file are:

HESEXCL = 0

HESMODE = SWOUT.

13. Further filters that can be applied are the same as those in Table 1: Full-time counts of years of instance.
14. To find the total years of instance in this population, sum the values of PRGC2. The FTEs in this table are calculated by multiplying each year of instance by 0.5.

Table 3: Part-time counts of years of instance and FTE

15. For the population that appears in this table, the first filters to apply to the individualised file are:

HESEXCL = 0

HESMODE = PT.

16. Further filters that can be applied are the same as those in Table 1: Full-time counts of years of instance.

17. To find the FTEs for the years of instance (i.e. the figures in Column 4a), apply the appropriate filters, sum the values of the relevant FTE fields (FTEA, FTEB, FTEC11, FTEC12, FTEC2 and FTED) and then divide by 100. This can only be done if the filter HESCOMP = 4 is applied.

18. For example, to identify the total FTEs for years of instance that are in price group B, on a standard length year of instance, at undergraduate level and that are OfS-fundable, the filters to apply to the individualised file are:

HESEXCL = 0

HESMODE = PT

PRGB ≠ 0

LENGTH = S

HESLEVEL = UG

HESATYPE = HOMEF

HESCOMP = 4.

Then sum the values of FTEB and divide this by 100.

Table 4: Home fee undergraduate years abroad

19. For the population that appears in this table, the first filter to apply to the individualised file is HESYAPOP = 1.
20. For students on an outgoing Erasmus+ or Turing year abroad, the filter to apply to the individualised file is HESYATYPE = ERASMUS.
21. For students taking an outgoing year abroad outside the Erasmus+ or Turing programme the filter to apply to the individualised file is HESYATYPE = OTHER.
22. To identify whether a student is in Column 1 or Column 2 of the table filter to HESREG = 1 or HESREG = 2 respectively.

- a. To identify students in Column 1(a) and Column 2(a) the filter to apply to the individualised file is HESMODE = FTS.
 - b. To identify students in Column 1(b) and Column 2(b) the filter to apply to the individualised file is HESMODE = SWOUT.
23. A further filter can be applied to HESTYPE to filter to students who are either fundable (HESTYPE = HOMEF) or non-fundable (HESTYPE = HOMENF).
24. To find the total headcount of students sum the variable HESYAPOP.

Table 5: Further student analysis for planning purposes

25. For the population that appears in this table, the first filter to apply to the individualised file is HESEXCL = 0.
26. To further filter these years of instance, the following fields can be used:
- HESLEVEL
 - HESREG
 - HESTYPE
 - HESRESSTAT
 - HESMODE.
27. For example, to filter to full-time years of instance that are in Column 1, on an undergraduate course, are fundable and UK-domiciled, then the filters to apply to the individualised file are as follows:
- HESEXCL = 0
 - HESREG = 1
 - HESLEVEL = UG
 - HESMODE = FTS
 - HESRESSTAT = HOMEF_UK.
28. To find the equivalent population of new entrants (i.e., students in Section B of this table), apply the above filters as well as HESNEWENTRANT = 1. To find the total headcount of this population sum the HESNEWENTRANT variable.

Table 6a: Full-time counts of years of instance for home fee students on pre-registration health courses

29. For the population that appears in this table, the first filters to apply to the individualised file are:
- HESHEALTHPOP = 1
 - HESMODE = FTS.

30. To identify OfS-fundable years of instance in Column 1(a) and Column 2(a), the filter to apply to the individualised file is HESTYPE = HOMEF.
31. To identify non-fundable years of instance in Column 1(b) and Column 2(b), the filter to apply to the individualised file is HESTYPE = HOMENF.
32. To identify starters in 2021-22, the filter to apply to the individualised file is HESHEALTHYEAR = 2021-22.
33. Use HESHEALTHPROF to identify years of instance for a particular profession.
34. Further filters can be applied to identify those with a particular length of year of instance or level of study.
35. For example, to identify OfS-fundable years of instance for full-time, undergraduate level, standard length podiatry courses, the filters to apply to the individualised file are:
- HESHEALTHPOP = 1
HESMODE = FTS
HESTYPE = HOMEF
HESHEALTHPROF = PODCHI
LENGTH = S
HESLEVEL = UG.
36. To find the count of years of instance of a given population in this table, sum the HESHEALTHPOP variable with the relevant filters applied.

Table 6b: Sandwich year out counts of years of instance for home fee students on pre-registration health courses

37. For the population that appears in this table, the first filters to apply to the individualised file are:
- HESHEALTHPOP = 1
HESMODE = SWOUT.
38. To identify years of instance in the different columns, apply filters as set out in paragraphs 30 to 32.
39. Similar filters can be applied to those in paragraphs 33 and 34 to identify years of instance counted in a particular row.
40. To find the FTE of a given population, sum the HESHEALTHPOP variable with the relevant filters applied and multiply by 0.5.

Table 6c: Part-time counts of years of instance and FTE for home fee students on pre-registration health courses

41. For the population that appears in this table, the first filters to apply to the individualised file are:

HESHEALTHPOP = 1

HESMODE = PT.

42. To identify years of instance in the different columns, apply filters as set out in paragraphs 30 to 32.
43. Similar filters can be applied to those in paragraphs 33 and 34 to identify years of instance counted in a particular row.
44. To identify Column 4a FTEs, first apply the filters in paragraph 41 then apply HESCOMP = 4. The sum of HESESFTE divided by 100 will provide the FTE value of this column.

Funding tables

45. This section details how the 2022-23 funding allocations can be modelled using the 2021-22 ILR data, where HESES21 data has previously been used.
46. Within these tables the columns titled 'Calculations using HESES21 data' are the figures shown in the latest 2022-23 grant tables. Some of these values may not match the grant tables if there have been any amendments to HESES21 data since the grant announcement or where mergers have taken place.
47. The columns titled 'Calculations modelled using 2021-22 Student data' contain values from the 2021-22 ILR data, and calculations that are based on this data.
48. The columns titled 'Difference' are the figures calculated using 2021-22 ILR data minus the figures calculated using HESES21 data.

Table A: Summary of 2022-23 allocations

49. This table is a summary of the teaching grant allocations shown in Tables B, C, D, E and F, as well as showing fixed allocations that are not based on HESES21 data. This table will be used to identify unusual differences at a high level; the tables on the five other sheets can then be used to look at the differences in more detail.

Table B: 2022-23 High-cost subject funding

50. This table shows the calculation of 2022-23 high-cost subject funding.
51. 'OfS-fundable FTEs' is the sum of Column 4(a) of the '1_Full_time' tab, Column 4(a) of the '2_Sandwich' tab multiplied by 0.5 and Column 4a(a) of the '3_Part_time' tab.
52. 'Adjustments for over-recruitment against medical and dental intake targets' is taken from column E.
53. 'Other FTE adjustments' is taken from column F.
54. 'Total FTEs for 2022-23 high-cost subject funding' is the sum of the FTEs in columns I to K.
55. 'High-cost subject funding (£)' is the 'Total FTEs for 2022-23 high-cost subject funding' multiplied by the rates of funding and scaling factor shown on the 'G_Parameters' tab.

Table C: 2022-23 Nursing, midwifery and allied health supplement

56. This table shows the calculation of the 2022-23 Nursing, midwifery and allied health supplement.
57. 'OfS-fundable FTEs (Full-time and sandwich year out)' is the sum of full-time students taken from Column 4(a) of the '6a_Health_full_time' tab and sandwich year out students taken from Column 4(a) of the '6b_Health_sandwich' tab multiplied by 0.5.
58. 'OfS-fundable FTEs (Part-time)' is taken from Column 4a(a) of the '6c_Health_part_time' tab.

59. 'FTE adjustment' is taken from column E.
60. 'Total FTEs for NMAH supplement' is the sum of the FTEs in columns H to J.
61. The 'Nursing, midwifery and allied health supplement (£)' column is the 'Total FTEs NMAH supplement' multiplied by the rate of funding for that profession and level, as shown on the 'G Parameters' tab.

Table D: 2022-23 Overseas study programmes

62. This table shows the calculation of the 2022-23 Overseas study programmes allocation.
63. 'Full-time years abroad (OfS-fundable)', 'Full-time years abroad (Non-fundable)', 'Sandwich year out years abroad (OfS-fundable)' and 'Sandwich year out years abroad (Non-fundable)' are the years countable for each mode and fundability status, taken from Columns 1 and 2 of the '4_Year_abroad' tab. Sandwich years out that are not taken under the Erasmus+ or Turing programmes are not included.
64. 'Total years countable for overseas study programmes' is the sum of the years countable in columns H to K.
65. 'Overseas study programmes (£)' is the 'Total years countable for overseas study programmes' multiplied by the rate of funding shown on the 'G_Parameters' tab.

Table E: 2022-23 Other high-cost targeted allocations

66. This table shows the calculation of other targeted allocations.
67. 'OfS-fundable FTEs' is the sum of Column 4(a) of the '1_Full_time' tab, Column 4(a) of the '2_Sandwich' tab multiplied by 0.5 and Column 4a(a) of the '3_Part_time' tab.
68. 'Adjustments for over-recruitment against medical and dental intake targets' is taken from column F.
69. 'Other FTE adjustments' is taken from column G.
70. 'Total FTEs for 2022-23 other targeted allocations' is the sum of the FTEs in columns L to N.
71. 'Postgraduate taught supplement (£)' is the 'Total FTEs for 2022-23 other targeted allocations' multiplied by the postgraduate taught supplement parameters shown on the 'G_Parameters' tab.
72. 'Intensive postgraduate provision (£)' is the 'Total FTEs for 2022-23 other targeted allocations' multiplied by the intensive postgraduate parameters shown on the 'G_Parameters' tab.
73. 'Accelerated full-time undergraduate provision (£)' is the 'Total FTEs for 2022-23 other targeted allocations' multiplied by the accelerated full-time undergraduate provision parameters shown on the 'G_Parameters' tab.

Table F: 2022-23 Student access and success

74. This table shows the calculation of 2022-23 student access and success allocations.
75. **Premium to support successful student outcomes: full-time (main allocation and supplement).** The figure in the 'Total FTEs for 2022-23 Full-time and sandwich year out UG' row is the total FTE for full-time and sandwich year out UGs from the 'Total FTEs for 2022-23 other targeted allocations' column in 'E_Other_high_cost_TAs'.
76. **Premium to support successful student outcomes: part-time.** The figure in the 'Total FTEs for 2022-23: Part-time UG' row is the total FTE for part-time UGs from the 'Total FTEs for 2022-23 other targeted allocations' column in 'E_Other_high_cost_TAs'.
77. **Disabled students' premium.** The 'Total FTEs for 2022-23' figure is the total FTE for all modes and levels from the 'Total FTEs for 2022-23 other targeted allocations' column in 'E_Other_high_cost_TAs'.
78. **Premium for student transitions and mental health.** The 'Headcount of OfS-fundable undergraduate entrants' figure is the total OfS-fundable undergraduates included in 'Section B: New entrants' of the '5_Planning' tab.



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