

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

HESES23 training

Categorising your students using HESES23 definitions

Roger Lear
Funding Officer

19 September 2023

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Webinar housekeeping

- Presenters
 - Host: Roger Lear (backup – Will Awad)
 - Q&A: Graham Price
- 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 the chat to contact event support
- Please let us have your feedback.

HESES23 webinars

1. Introduction to OfS funding and HESES23:
 - Recording available on our events webpage
2. **Categorising your students and important definitions**
 - 1330 on Tuesday 19 September 2023
3. Identifying and counting students to be included in HESES23
 - 1330 on Thursday 21 September 2023
4. Submitting and verifying your HESES23 workbook:
 - Recording will be available on our events webpage after the previous webinar

More information at officeforstudents.org.uk/events

Supporting materials

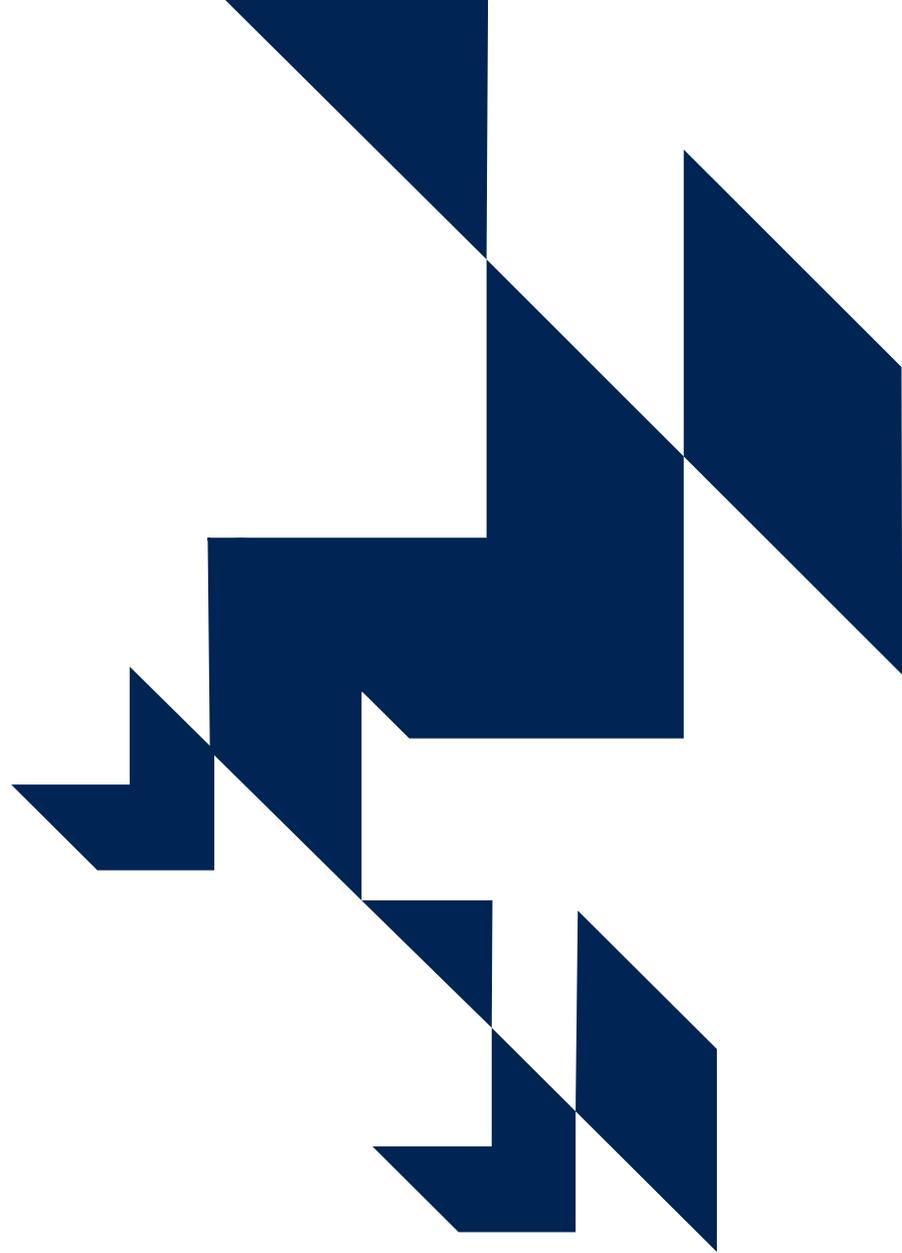
- A recording of this event and today's slides will be available from the OfS website at **officeforstudents.org.uk/events**
- Providers should also refer to **officeforstudents.org.uk/heses**
 - includes model HESES23 workbooks
 - 'Completing the HESES23 workbook' publication
- **'The Guidance Document' - officeforstudents.org.uk/heses23**
 - 'HESES23 – Higher Education Students Early Statistics survey 2023-24'
- HESES videos on the OfS YouTube page: **youtube.com/officeforstudents**
- Overview of OfS funding: 'Guide to funding 2023-24' publication
 - Search 'OfS 2023.32' on the OfS website
- Sign up for email alerts: **officeforstudents.org.uk/sign-up-for-email-alerts**

What we will cover today



- The HESES23 workbook
- The HESES23 population
- Categorising your students
 - mode
 - level of study
 - length of year
 - price group
 - fundability status
 - domicile
 - new entrants.

The HESES23 workbook



The HESES23 workbook

A Higher Education Provider

UKPRN: 10000000

Dates

Census date: Friday 1 December 2023

Submission deadline: Noon Monday 11 December 2023

Submission information

Date workbook submitted: SAMPLE

Submission number: SAMPLE

Workbook checks

Validation checks:

No validation errors

Credibility checks:

No credibility warnings

Comparison table highlighting:

Not included in sample tables

About this workbook

This workbook collects data from providers in the Approved (fee cap) category of the Office for Students (OfS) register.

This workbook collects counts of years of engagement at a provider in the 2023-24 academic year as defined in the HESES23 guidance, compares the data collected to student data returns from previous years and models funding based on the data collected. (All modelling should be treated as illustrative only and should not be considered to be any kind of funding commitment by the OfS.)

Completed workbooks can be uploaded any number of times until the deadline for submission. When the deadline passes, the latest uploaded version will be taken as the final workbook for submission.

Any workbook uploaded before the census date will be treated as invalid, and a further workbook will need to be uploaded on or after the census date to pass validation checks.

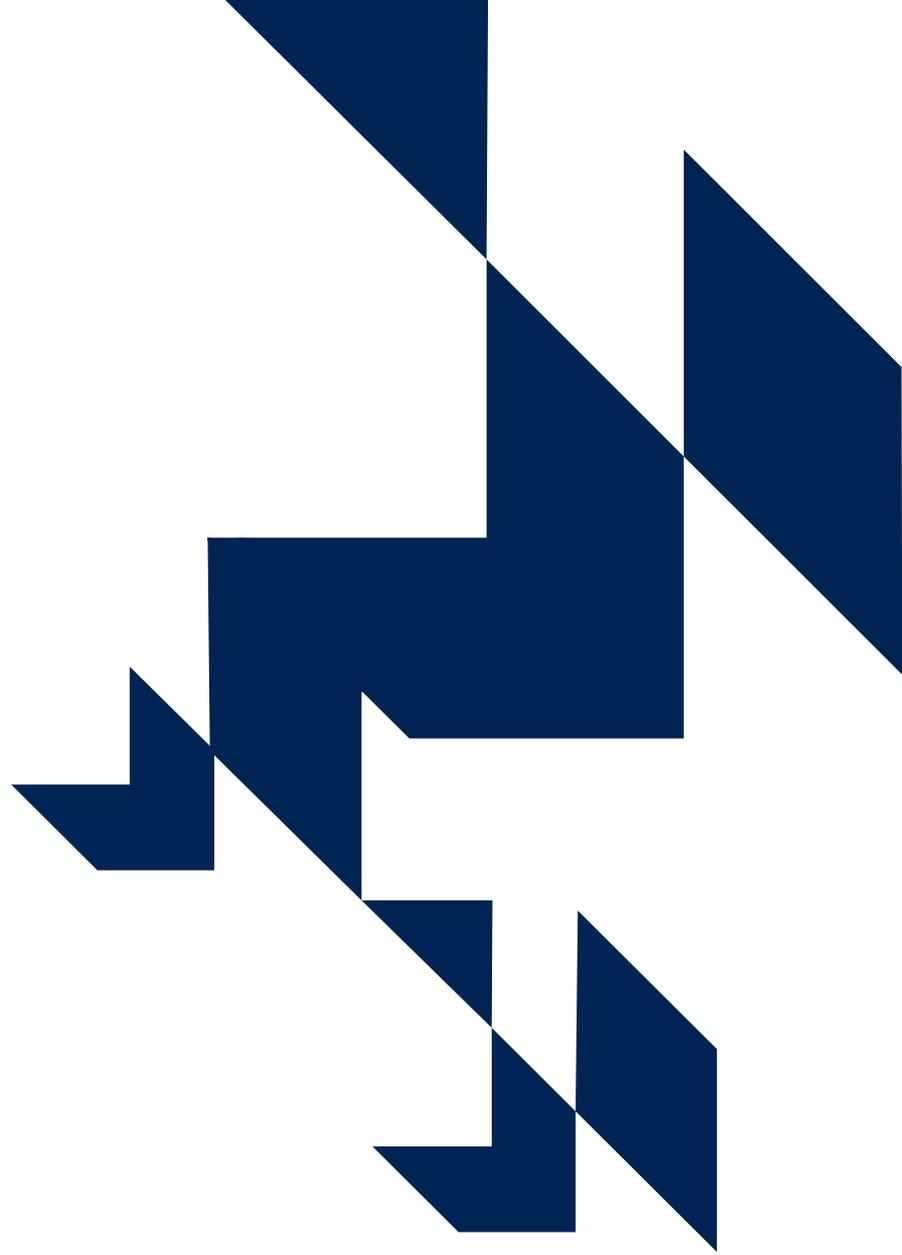
If you require an accessible version of this workbook please contact heses@officeforstudents.org.uk

Guidance

What does the HESES23 workbook do?

- Gives an early indication of the number of higher education students studying in the academic year 2023-24
- It does this by:
 - **Categorising** students (today's webinar), and then
 - **Counting** them in their different categories (next webinar).

The HESES23 population



What is recorded in HESES?

- HESES counts **'years of engagement'** ('YoE')
- Change in terminology from previous years: we used to talk about 'years of instance'
 - 'Changes to 2023 student data surveys to inform funding: Notification of changes'
 - Search for OfS 2023.33 on our website
 - Our recent webinar: 'HESES23: essential updates for experienced staff'
 - See **officeforstudents.org.uk/events**
 - Contact us at **heses@officeforstudents.org.uk**

What is an 'engagement'?

- **Definition**

- an **engagement** is a student's commitment to an educational aim (qualification or credit) and its realisation over time.

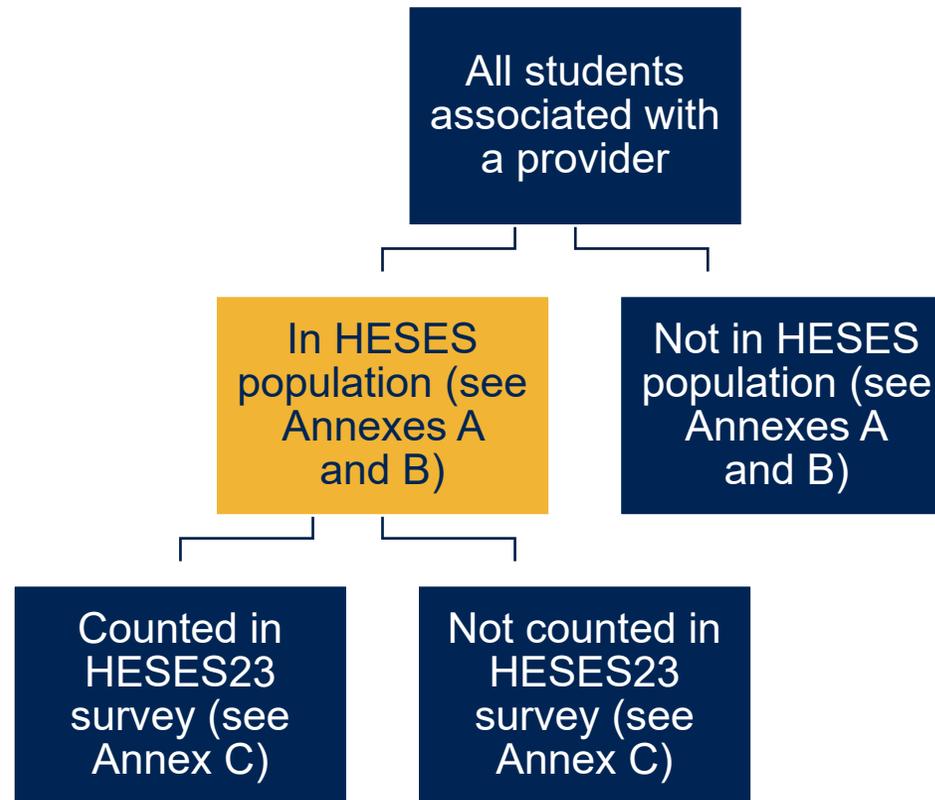
- **Further Education and sixth form colleges and academies (FECs)**

- defined with reference to the anniversary of the student's start date (the same as year of instance)
- same as used in the Individualised Learner Record (ILR) for the ESFA

- **Other providers**

- DDB Student record now using the Data Futures specification, therefore ...
- ... usually based on the latest Student Course Session that starts in the 2023-24 academic year: for most students, likely to broadly align with year of instance.

Working out who to include in HESES23



Who is included in the HESES23 population?

- See Annex A - 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 2023-24 academic year
 - spending no more than half the active study time for their whole engagement outside the UK
- Notes
 - HESES23 counts **all** years of engagement in 2023-24 academic year, not just those for students starting their studies in 2023-24.
 - it's possible for one student to generate more than one year of engagement (although this is rare and limitations may apply: see the HESES guidance).

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.

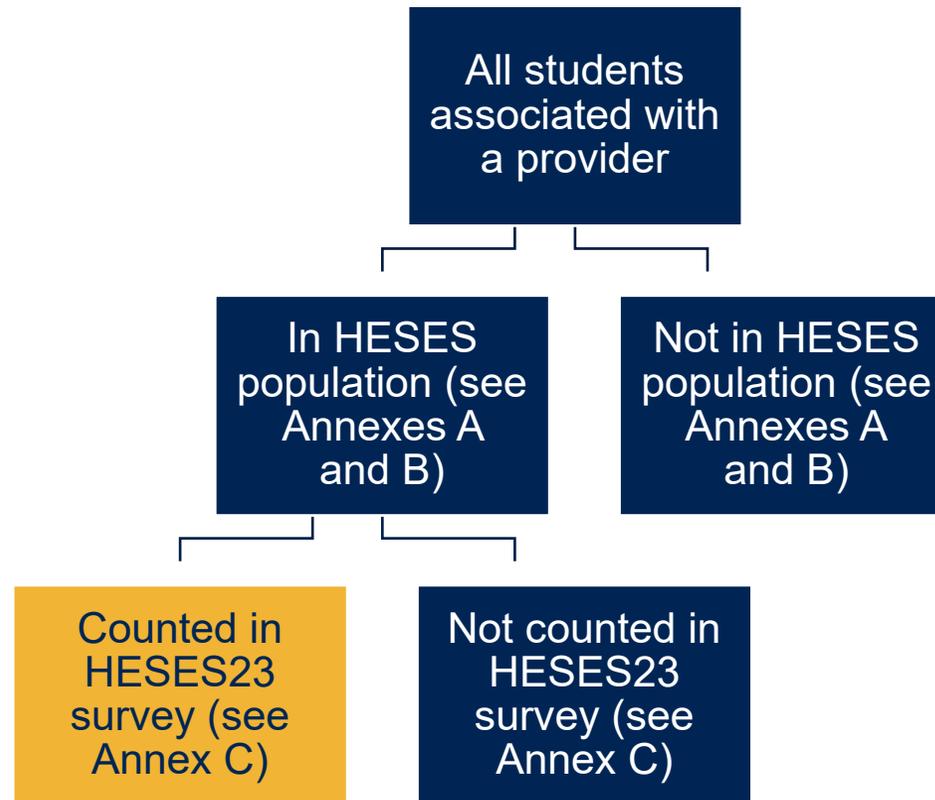
Study for higher education level credit may also be included if it meets the criteria in Schedule 6 of the Education Reform Act 1988 and **either**:

- 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.

Higher Technical Qualifications (HTQs) in HESES23

- Courses leading to HTQs approved by the Institute for Apprenticeships and Technical Education (IfATE) have been added to the categories of courses designated under the Education (Student Support) Regulations 2011.
- Some courses already met the student support criteria (e.g. foundation degrees, Higher National Certificates/Diplomas)
- In academic year 2023-24, some are eligible for the first time
 - if so, they may also meet the requirements to be recognised courses for OfS funding purposes.
- Being an HTQ is not sufficient on its own to be designated for student support purposes
 - Check OfS 2023.33 (the 'Changes document') & HESES guidance (Annex B).

Working out who to include in HESES23



Which years of engagement to count in HESES23

- To be counted, years of engagement for 2023-24 must meet all these criteria:
 - A fee must be charged – see Annex C for more detail
 - 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 engagement.
- There will be more about **how** to count years of engagement in the next webinar.

Who is included in the HESES23 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 2023-24 academic year**
 - spending no more than half the active study time for their whole engagement outside the UK
- Notes
 - HESES23 counts **all** years of engagement in 2023-24 academic year, not just those for students starting their studies in 2023-24.
 - it's possible for one student to generate more than one year of engagement (although this is rare and limitations may apply: see the HESES guidance).

Students ‘registered with a provider’

- Students should only be returned in HESES23 (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 of the HESES guidance.

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 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
 - no additional data is being collected on degree apprenticeship courses in HESES23.

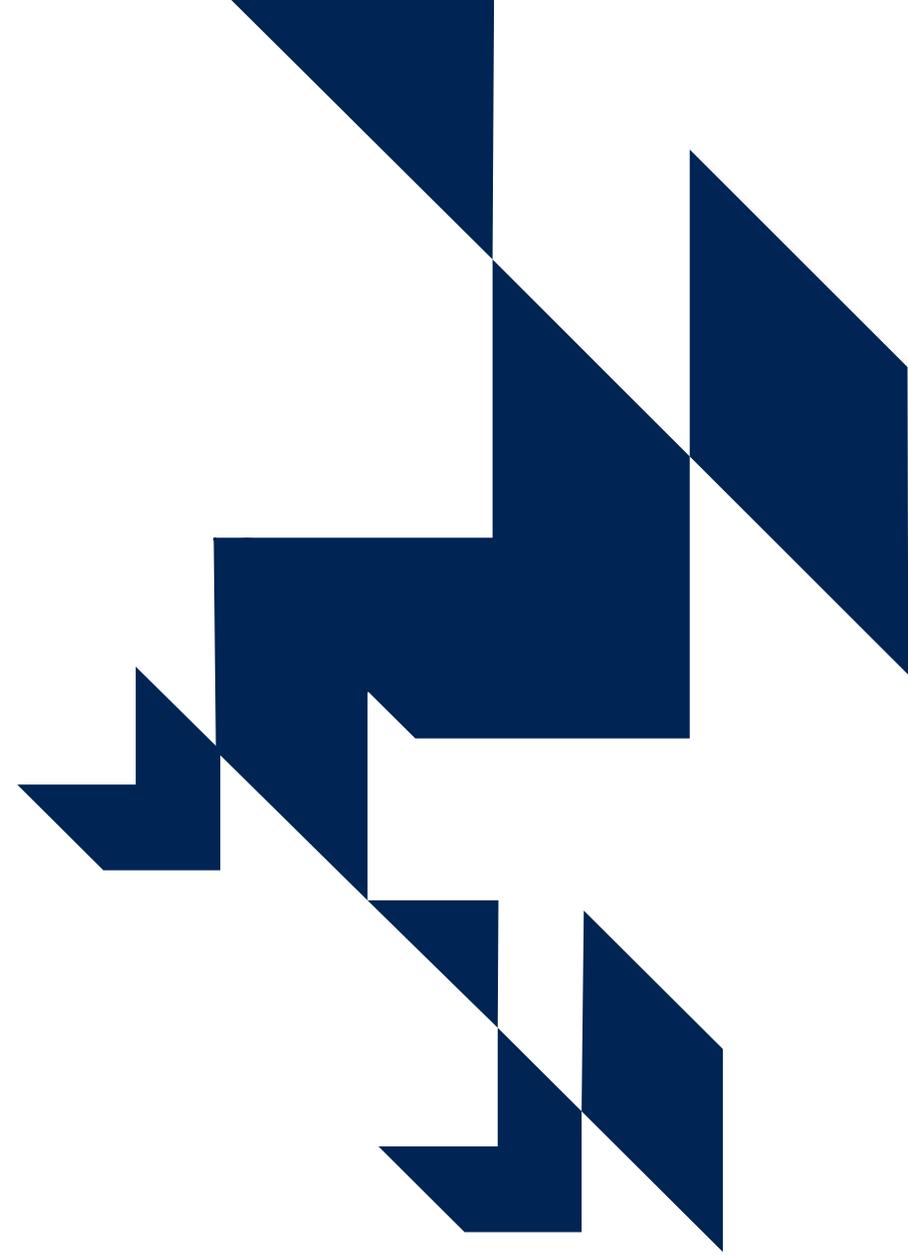
Any questions?

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, categorised 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
 - full-time: Table 1
 - sandwich year out: Table 2
 - part-time: Table 3
- Mutually exclusive
- (The other tables shown here analyse the same data in different ways – more on these later.)

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 and 6c: Health	All

* Courses table: Further education and sixth-form colleges & academies only.

Mode: full-time (Table 1)

- Full-time fees are chargeable
 - Fees can be waived, but there are restrictions on this (see Annex D)
- Normally required to **attend** for at least **24 weeks in the year** of engagement at a specific location
 - at the provider themselves or somewhere else (e.g. sub-contracted location)
- Undertake study, tuition, learning in the workplace, work placement for an average of 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 year of engagement is counted as a sandwich year out if it includes a period of work-based experience **and** it meets these criteria:

- A reduced fee is chargeable
- Meets the definition given in the student support regulations **OR** is an Erasmus year abroad spent working
- Meets the time-based criteria in Annex D
 - 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 D.



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 does not meet the definitions for:
 - full-time or
 - sandwich year out
 - then **for HESES purposes** it is considered **part-time**.
- Mode can change between years
 - More detail and examples are in Annex D

Mode: different definitions

- 'Full-time' as recorded on the relevant individualised student data return may not be the same as HESES full-time
 - Example: a student studying full-time on a 15 month course. In their second year of engagement (the last three months) they would be studying at a full-time intensity (greater than 21 hours a week) but would be studying for less than 24 weeks.
 - This would make them part-time for HESES, but full-time for the individualised data return.
 - **ILR:** use MODESTUD=3
 - **Data futures:** use SCSMODE=02 (Other full-time).
- Refer to the 'Additional guidance on mode of study' section in Annex D of the HESES guidance.

Recording mode for apprenticeship students



Some students may take a higher education qualification as part of an **apprenticeship**:

- we only fund activity related to the higher education course
- therefore usually part-time
- must satisfy additional criteria to be recorded as full-time
 - see the HESES guidance Annex D.

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

Table 1: Full-time counts of years of engagement

A Higher Education Provider

Price group: Annex G (circled in red)

Length: Annex H

Level: Annex E (circled in red)

Validation: OK

Credibility: OK

Fundability status: Annex F (circled in red)

			Column 1 (circled in red)	Column 2 (circled in red)	Column 1 + 2 (circled in red)	
			Years countable between 1 August 2023 and census date inclusive	Forecast of years countable after census date and before 1 August 2024	Years countable in academic year 2023-24 (Columns 1 + 2)	
			Home fee			
			OfS-fundable (a)	Non-fundable (b)	Overseas (c)	
Price group	Length	Level	(a)	(b)	(c)	
A	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	
		UG (Other)	0.00	0.00	0.00	
		PGT (UG fee)	0.00	0.00	0.00	
		PGT (Masters' loan)	0.00	0.00	0.00	
		PGT (Other)	0.00	0.00	0.00	
		PGR	0.00	0.00	0.00	
	Long	UG (Level 4 and 5)	0.00	0.00	0.00	
		UG (Other)	0.00	0.00	0.00	
		PGT (UG fee)	0.00	0.00	0.00	
		PGT (Masters' loan)	0.00	0.00	0.00	
		PGT (Other)	0.00	0.00	0.00	
		PGR	0.00	0.00	0.00	
	B	Standard	UG (Level 4 and 5)	0.00	0.00	0.00
			UG (Other)	0.00	0.00	0.00
			PGT (UG fee)	0.00	0.00	0.00
PGT (Masters' loan)			0.00	0.00	0.00	
PGT (Other)			0.00	0.00	0.00	
PGR			0.00	0.00	0.00	
Long		UG (Level 4 and 5)	0.00	0.00	0.00	
		UG (Other)	0.00	0.00	0.00	
		PGT (UG fee)	0.00	0.00	0.00	
		PGT (Masters' loan)	0.00	0.00	0.00	
		PGT (Other)	0.00	0.00	0.00	
		PGR	0.00	0.00	0.00	
C1.1		Standard	UG (Level 4 and 5)	0.00	0.00	0.00

Price groups – what are they?

Years of engagement 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:** LearnDirect 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 **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** reference 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://submit-learner-data.service.gov.uk/find-a-learning-aim/>
 - 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 engagement 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 engagement** would be recorded with this 60-40 split.

Example: Table 1

Table 1: Full-time counts of years of engagement

A Higher Education Provider

Price group: Annex G Length: Annex H Level: Annex E Validation: OK Credibility: OK Fundability status: Annex F

Price group	Length	Level	Column 1			Column 2			Column 1 + 2			
			Years countable between 1 August 2023 and census date inclusive			Forecast of years countable after census date and before 1 August 2024			Automatically populated			
			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)	
A	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
		PGR		0.00	0.00		0.00	0.00		0.00	0.00	
	Long	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
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			PGT (UG fee)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
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PGT (Other)			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	
C1.1	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
		PGR		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 engagement
 - 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 H for full details

Standard-length years

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

Example: Table 1

Table 1: Full-time counts of years of engagement

A Higher Education Provider

Price group: Annex G Length: Annex H **Level: Annex E** Validation: OK Credibility: OK Fundability status: Annex F

Price group	Length	Level	Column 1			Column 2			Column 1 + 2			
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		PGT (UG fee)	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	
		PGT (Other)	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 (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
		PGR		0.00	0.00		0.00	0.00		0.00	0.00	
	B	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			UG (Other)	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
PGT (Masters' loan)			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	
PGR				0.00	0.00		0.00	0.00		0.00	0.00	
Long		UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
		PGR		0.00	0.00		0.00	0.00		0.00	0.00	
C1.1	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	

Level of study – undergraduate and postgraduate



- **UG – undergraduate**
 - no degree level entry requirement.
- **PGT – postgraduate taught**
 - normal entry requirement is a degree level qualification.
- **PGR – postgraduate research**
 - qualification aim is a research-based higher degree.

Level of study – undergraduate (UG)

UG – undergraduate

- no degree level entry requirement
- two sub-levels - determined by the qualification aim for the course:
 - **UG (Level 4 and 5)** e.g. HNC/HND/foundation degree
 - **UG (Other)** e.g. a bachelors' degree/top-up/credit without a qualification aim
- If course has **multiple qualification aims** – check the guidance and/or please talk to us
- Please refer to the HESES guidance (Annex E).

Price group	Length	Level	Home fee		
			OfS-fundable (a)	Non-fundable (b)	Overseas (c)
A	Standard	UG (Level 4 and 5)	0.00	0.00	0.00
		UG (Other)	0.00	0.00	0.00
		PGT (UG fee)			
		PGT (Masters' loan)	0.00	0.00	0.00
		PGT (Other)	0.00	0.00	0.00
		PGR		0.00	0.00
		Long	UG (Level 4 and 5)	0.00	0.00
	UG (Other)		0.00	0.00	0.00
	PGT (UG fee)				
	PGT (Masters' loan)		0.00	0.00	0.00
	PGT (Other)		0.00	0.00	0.00
	PGR			0.00	0.00

Level of study – postgraduate taught (PGT)

PGT – postgraduate taught

- normal entry requirement is a degree level qualification
- three sub-levels:
 - **PGT (UG fee):** 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 E).

Price group	Length	Level	Home fee		
			OfS-fundable (a)	Non-fundable (b)	Overseas (c)
A	Standard	UG (Level 4 and 5)	0.00	0.00	0.00
		UG (Other)	0.00	0.00	0.00
		PGT (UG fee)			
		PGT (Masters' loan)	0.00	0.00	0.00
		PGT (Other)	0.00	0.00	0.00
		PGR		0.00	0.00
	Long	UG (Level 4 and 5)	0.00	0.00	0.00
		UG (Other)	0.00	0.00	0.00
		PGT (UG fee)			
		PGT (Masters' loan)	0.00	0.00	0.00
		PGT (Other)	0.00	0.00	0.00
		PGR		0.00	0.00

Level of study – postgraduate research (PGR)

PGR – postgraduate research

- found in a few places in the workbook
- not used for funding just for planning
- refer to the HESES guidance (Annex E).

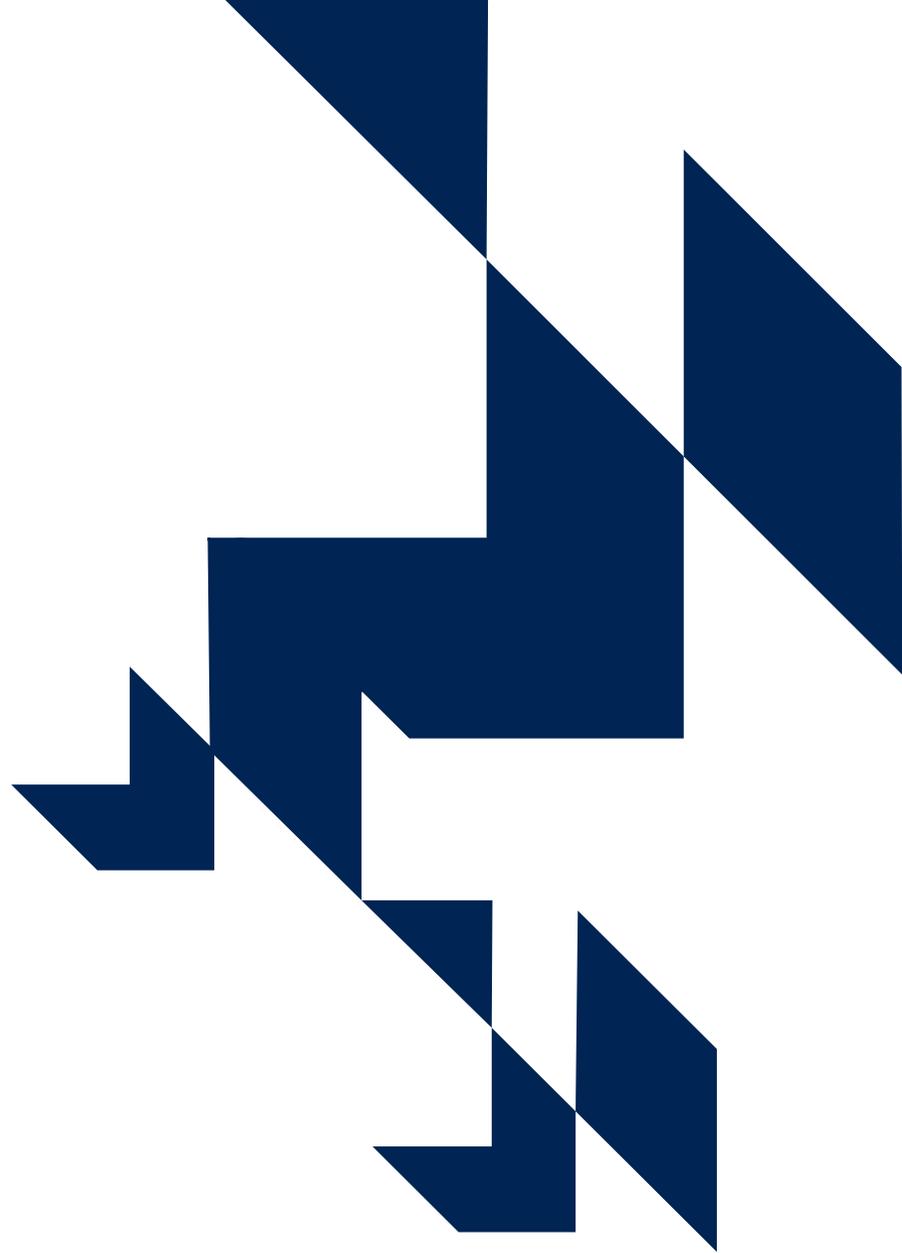
Any questions?

Please use the Q&A box



Categorising your students:

Fundability status and domicile
New entrants
Other classifications



Example: Table 1

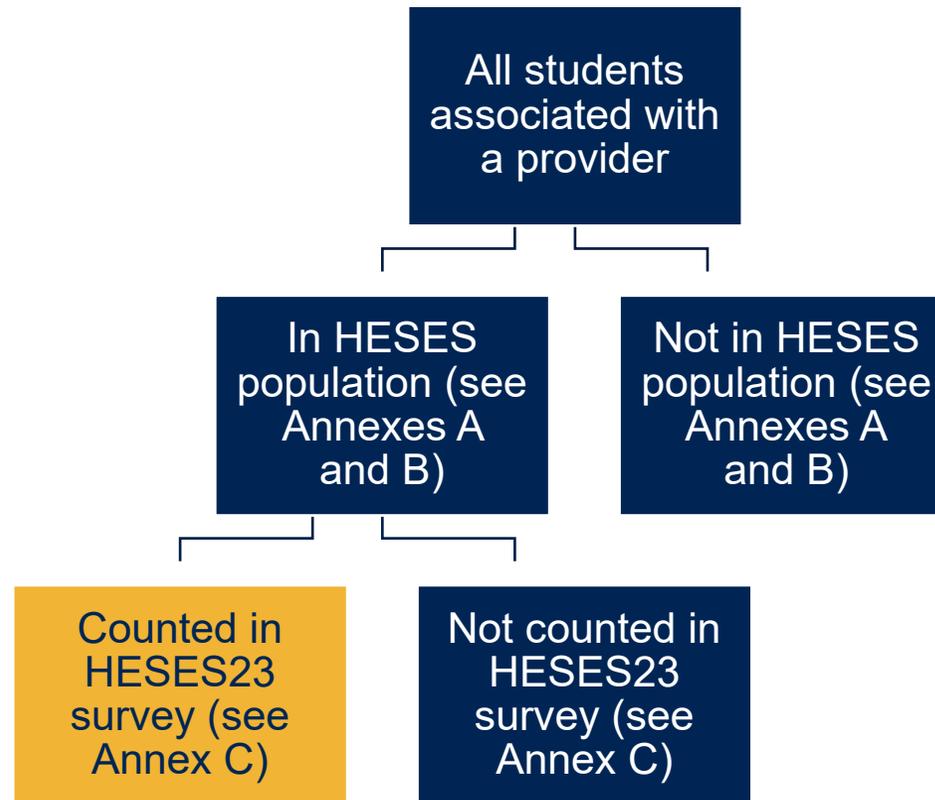
Table 1: Full-time counts of years of engagement

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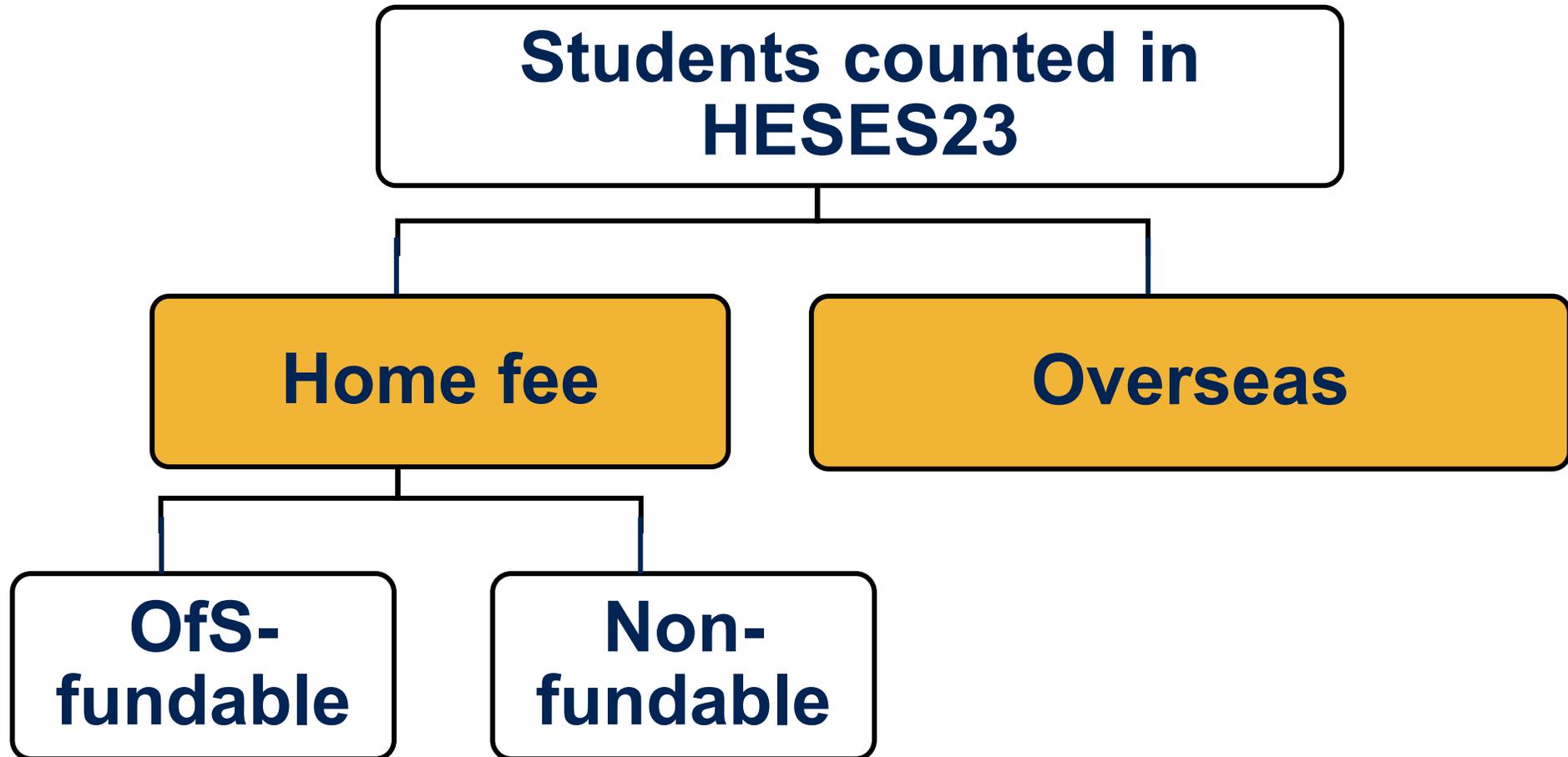
Price group: Annex G Length: Annex H Level: Annex E Validation: OK Credibility: OK **Fundability status: Annex F**

Price group	Length	Level	Column 1			Column 2			Column 1 + 2			
			Years countable between 1 August 2023 and census date inclusive			Forecast of years countable after census date and before 1 August 2024			Automatically populated Years countable in academic year 2023-24 (Columns 1 + 2)			
			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)	
A	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
		PGR		0.00	0.00		0.00	0.00		0.00	0.00	
	Long	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
		PGR		0.00	0.00		0.00	0.00		0.00	0.00	
	B	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
			UG (Other)	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
PGT (Masters' loan)			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	
PGR				0.00	0.00		0.00	0.00		0.00	0.00	
Long		UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	
		PGT (Masters' loan)	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	
		PGR		0.00	0.00		0.00	0.00		0.00	0.00	
C1.1	Standard	UG (Level 4 and 5)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
		UG (Other)	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	

Working out who to include in HESES23



Fundability status (Annex F) – fees



Fundability status (Annex F) – definitions

Home fee – as defined by the fee regulations

- From 1 August 2022, following changes to legislation, includes further categories of students eligible for home fee status
- May also include some EU students covered by the withdrawal agreements
- Refer to Student Finance England (SFE) regulations for full details.

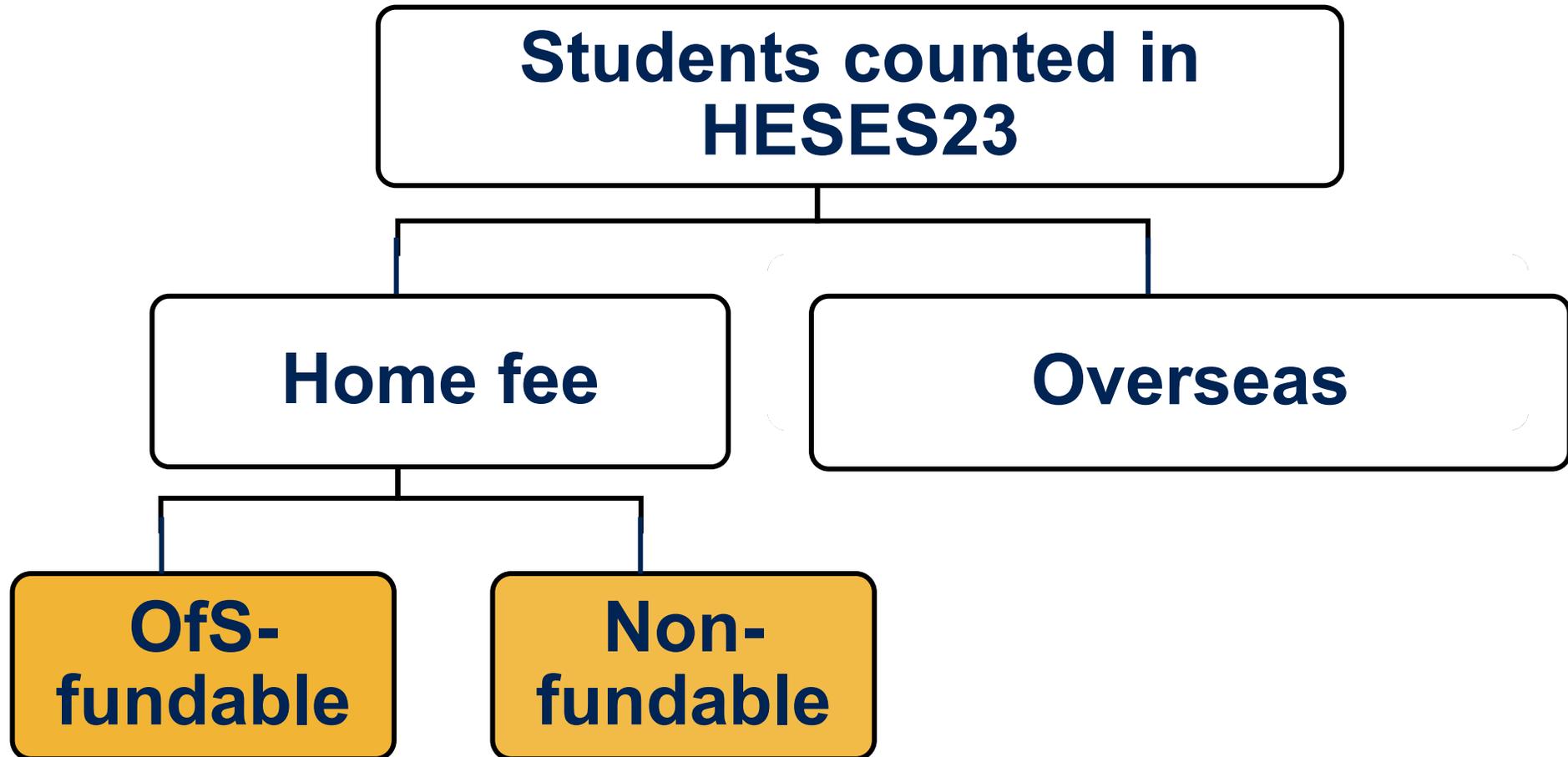
Overseas – those outside the definition of home fee status

- Not included in funding allocations but we still count them

See Annex F in the HESES guidance

- Note: the HESES guidance is **not** definitive – refer to the SFE 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 (1)

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 HESES guidance 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: ELQs (2)

Note:

- Students can be aiming for more than one qualification as part of the same course, e.g. an HND and a degree.
 - For ELQ purposes, assess status against the LOWER qualification
- ELQ is a concept used by some other organisations but be aware that their definition may be different from ours.

Domicile (Annex F)

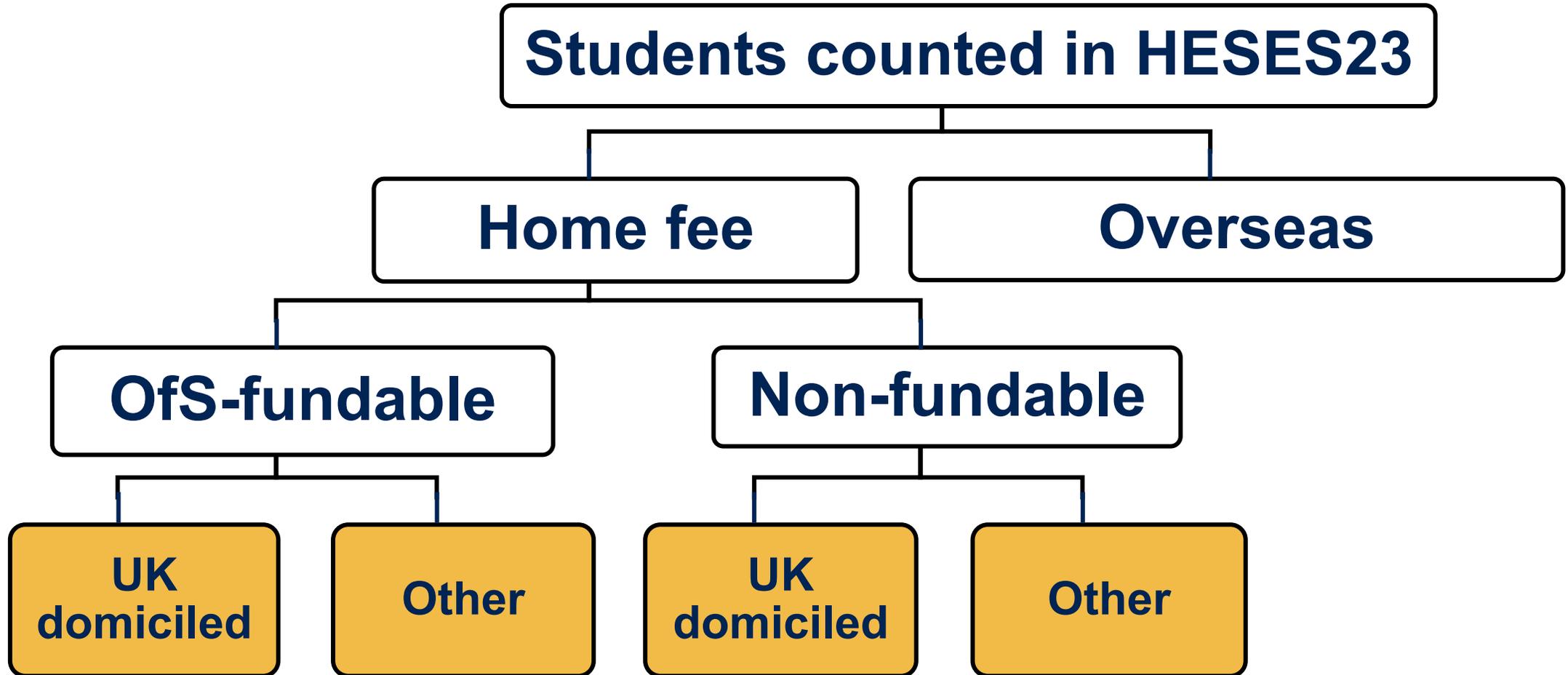


Table 5 – the planning table (overview)

Table 5: Further student analysis for planning purposes

A Higher Education Provider

Validation and credibility checks are described in full detail below the table.

Validation: OK

Validation: OK

Validation: OK

Validation: OK

Credibility: OK

Credibility: OK

Credibility: OK

Credibility: OK

		Section A: All years					Section B: New entrants					Section C: HTQs			
		Column 1			Column 2							Students on higher technical qualifications (HTQs) included in Section A of this table			
		Years countable between 1 August 2023 and census date inclusive					Forecast of years countable after census date and before 1 August 2024 (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		(b) Non-fundable	
Mode	Level	(i)	(ii)	(i)	(ii)		(i)	(ii)	(i)	(ii)		(i)	(ii)	(i)	(ii)
Full-time and sandwich year out	UG (Level 4 and 5)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	UG (Other)	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
	PGT (Masters' loan)	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
	PGR			0	0	0			0	0	0			0	0
Part-time	UG (Level 4 and 5)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	UG (Other)	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
	PGT (Masters' loan)	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
	PGR			0	0	0			0	0	0			0	0
All modes	All UG	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	All PG	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

Table 5 – the planning table (Section A)

		Section A: All years									
		Column 1					Column 2				
		Years countable between 1 August 2023 and census date inclusive					Forecast of years countable after census date and before 1 August 2024 (as entered in Column 2 of Tables 1, 2 and 3)				
		Home fee					Home fee				
		(a) OfS-fundable		(b) Non-fundable		(c)	(a) OfS-fundable		(b) Non-fundable		(c)
		UK-domiciled	Other	UK-domiciled	Other	Overseas	UK-domiciled	Other	UK-domiciled	Other	Overseas
Mode	Level	(i)	(ii)	(i)	(ii)		(i)	(ii)	(i)	(ii)	
Full-time and sandwich year out	UG (Level 4 and 5)	0	0	0	0	0	0	0	0	0	0
	UG (Other)	0	0	0	0	0	0	0	0	0	0
	PGT (UG fee)	0	0	0	0	0	0	0	0	0	0
	PGT (Masters' loan)	0	0	0	0	0	0	0	0	0	0
	PGT (Other)	0	0	0	0	0	0	0	0	0	0
	PGR				0	0	0			0	0
Part-time	UG (Level 4 and 5)	0	0	0	0	0	0	0	0	0	0
	UG (Other)	0	0	0	0	0	0	0	0	0	0
	PGT (UG fee)	0	0	0	0	0	0	0	0	0	0
	PGT (Masters' loan)	0	0	0	0	0	0	0	0	0	0
	PGT (Other)	0	0	0	0	0	0	0	0	0	0
	PGR				0	0	0			0	0
All modes	All UG	0	0	0	0	0	0	0	0	0	0
	All PG	0	0	0	0	0	0	0	0	0	0
	Total	0	0	0	0	0	0	0	0	0	0

Domicile (1)

- Shares a definition with the corresponding individualised student data record:
 - For those returning the ILR (i.e. further education and sixth form colleges and academies): see the **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.’
 - For those returning the designated data body return (‘data futures’): **PERMADDCOUNTRY** field
 - ‘the country of the student's permanent home address on entry to their engagement’
- For HESES
 - only relevant for **home fee** students
 - only used on Table 5 (and for FECs, the Courses table).

Domicile (2)

		Section A: All years				
		Column 1				
		Years countable between 1 August 2023 and census date inclusive				
		Home fee				(c) Overseas
		(a) OfS-fundable		(b) Non-fundable		
Mode	Level	UK-domiciled (i)	Other (ii)	UK-domiciled (i)	Other (ii)	
Full-time and sandwich year out	UG (Level 4 and 5)	0	0	0	0	0
	UG (Other)	0	0	0	0	0
	PGT (UG fee)	0	0	0	0	0
	PGT (Masters' loan)	0	0	0	0	0
	PGT (Other)	0	0	0	0	0
	PGR				0	0
Part-time	UG (Level 4 and 5)	0	0	0	0	0
	UG (Other)	0	0	0	0	0
	PGT (UG fee)	0	0	0	0	0
	PGT (Masters' loan)	0	0	0	0	0
	PGT (Other)	0	0	0	0	0
	PGR				0	0
All modes	All UG	0	0	0	0	0
	All PG	0	0	0	0	0
	Total	0	0	0	0	0

- Applies to **home fee students only**
 - **UK-domiciled**
 - entitled to pay home fees **and**
 - country of domicile = England, Northern Ireland, Scotland, Wales, UK not otherwise specified
 - **Other**

Table 5 – the planning table

Table 5: Further student analysis for planning purposes

A Higher Education Provider

Validation and credibility checks are described in full detail below the table.

		Validation: OK Credibility: OK					Validation: OK Credibility: OK					Validation: OK Credibility: OK									
		Section A: All years					Section B: New entrants					Section C: HTQs									
		Column 1					Column 2														
		Years countable between 1 August 2023 and census date inclusive					Forecast of years countable after census date and before 1 August 2024 (as entered in Column 2 of Tables 1, 2 and 3)					New entrants included in Section A of this table					Students on higher technical qualifications (HTQs) included in Section A of this table				
		Home fee					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	(a) OFS-fundable		(b) Non-fundable		
Mode	Level	(i)	(ii)	(i)	(ii)		(i)	(ii)	(i)	(ii)		(i)	(ii)	(i)	(ii)						
Full-time and sandwich year out	UG (Level 4 and 5)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
	UG (Other)	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					
	PGT (Masters' loan)	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					
Part-time	PGR			0	0	0			0	0	0			0	0	0					
	UG (Level 4 and 5)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
	UG (Other)	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					
	PGT (Masters' loan)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0					
All modes	PGT (Other)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0					
	All UG	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
	All PG	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	0	0		

Table 5 – Section B: new entrants

		Section B: New entrants						Section C: HTQs	
		New entrants included in Section A of this table						Students on higher technical qualifications (HTQs) included in Section A of this table	
		Home fee		Home fee		Home fee		Home fee	
		(a) OfS-fundable		(b) Non-fundable		(c) Overseas		(a) OfS-fundable (b) Non-fundable	
		UK-		UK-					
		domiciled		domiciled					
		Other		Other					
		(i)		(i)					
		(ii)		(ii)					
Full-time and sandwich year out	UG (Level 4 and 5)	0	0	0	0	0	0	0	0
	UG (Other)	0	0	0	0	0	0		
	PGT (UG fee)	0	0	0	0	0	0		
	PGT (Masters' loan)	0	0	0	0	0	0		
	PGT (Other)	0	0	0	0	0	0		
	PGR				0	0	0		
Part-time	UG (Level 4 and 5)	0	0	0	0	0	0	0	0
	UG (Other)	0	0	0	0	0	0		
	PGT (UG fee)	0	0	0	0	0	0		
	PGT (Masters' loan)	0	0	0	0	0	0		
	PGT (Other)	0	0	0	0	0	0		
	PGR				0	0	0		
All modes	All UG	0	0	0	0	0	0	0	0
	All PG	0	0	0	0	0	0		
	Total	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 engagement
 - 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).

Table 5 – Section C: higher technical qualifications (HTQs)

		Section B: New entrants					Section C: HTQs	
		New entrants included in Section A of this table					Students on higher technical qualifications (HTQs) included in Section A of this table	
Home fee		(a) OfS-fundable		(b) Non-fundable		(c) Overseas		
Mode	Level	UK-domiciled (i)	Other (ii)	UK-domiciled (i)	Other (ii)	(a) OfS-fundable	(b) Non-fundable	
Full-time and sandwich year out	UG (Level 4 and 5)	0	0	0	0	0	0	
	UG (Other)	0	0	0	0			
	PGT (UG fee)	0	0	0	0			
	PGT (Masters' loan)	0	0	0	0			
	PGT (Other)	0	0	0	0			
	PGR			0	0			
Part-time	UG (Level 4 and 5)	0	0	0	0	0	0	
	UG (Other)	0	0	0	0			
	PGT (UG fee)	0	0	0	0			
	PGT (Masters' loan)	0	0	0	0			
	PGT (Other)	0	0	0	0			
	PGR			0	0			
All modes	All UG	0	0	0	0	0	0	
	All PG	0	0	0	0			
	Total	0	0	0	0	0	0	

Table 5 - Section C: HTQs

- We are collecting this information to inform the additional funding that we will allocate to HTQ providers mid-2023-24.
- To be eligible, an HTQ has to be **approved** by the Institute for Apprenticeships and Technical Education (IfATE)
 - A qualification may meet the requirements to be an HTQ, but if it is **not approved** by IfATE, it is **not** an HTQ.
- More in the next webinar – full details in the HESES guidance (Annex C).

Other classifications

- **Table 4:** year abroad (Annex I)
- **Tables 6a-6c:** health tables – more on these in the next seminar
 - full-time: Table 6a
 - part-time: Table 6c
 - (Table 6b is no longer used).

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 and 6c: Health	All

* Courses table: Further Education and sixth-form colleges & 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 HESES guidance document, 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 D
Level of study	Annex E
Price group	Annex G
Long or standard-length year	Annex H
Fundability status or domicile	Annex F
New entrants	Annex C

What we have covered today



- The HESES23 workbook
- The HESES23 population
- Categorising your students
 - mode
 - level of study
 - length of year
 - price group
 - fundability status
 - domicile
 - new entrants.

Next webinar

1330 on Thursday 21 September 2023

Identifying and counting students to be included in HESES23

- This webinar will cover:
 - how to count student years
 - how to record students on Higher Technical Qualifications (HTQs)
 - how to complete the healthcare tables in HESES23.
- Sign up at officeforstudents.org.uk/events

After this, we will also release our **Submitting and verifying your HESES23 workbook** video.

How to find out more

Website: www.officeforstudents.org.uk/heses

YouTube: www.youtube.com/officeforstudents

Email: heses@officeforstudents.org.uk

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 dark blue.

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Thank you for listening

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