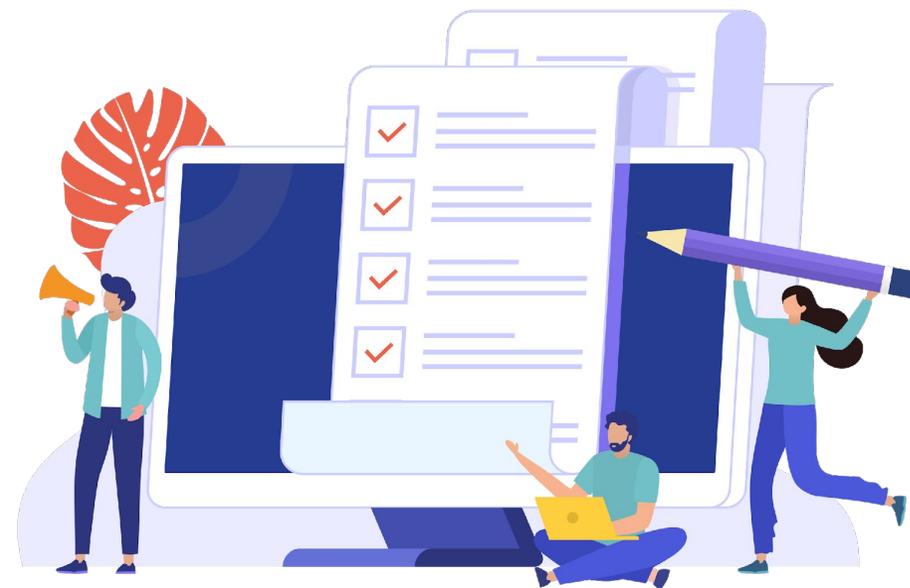


Bursary 16+

“HOW -TO GUIDE”





CONTENTS

1	Onboarding Tasks
2	ESFA Guidance
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12	Additional Settings

1

ONBOARDING TASKS

COMPLETE THESE TASKS TO GET STARTED

- Bursary Applications
 - Upload Your School's Logo (About 1 minute)
 - Personalise Your Application Form's Welcome Image (About 1 minute)
 - General School Settings (About 2 minutes)
 - Parent Welcome Message (About 5 minutes)
 - Student Homepage Welcome Message (About 5 minutes)
 - View Your Application Form's Questions (About 5 minutes)
 - Add Other Staff Users (About 2 minutes)
 - Add Your Form's URL To Your School Website (About 1 minute)

Managing your bursaries with Bursary16+

You are moments away from being ready to start using your new bursary management system. Before launching, take a moment see how your new process will work!

Bursary+ Onboarding Welcome

48 sec 26 views

COMPLETE THESE TASKS TO GET STARTED

Upload your school's logo

Registered Users

Welcome to the Bursary Application system

All students are welcome to apply

By clicking the link in your welcome email, you will be prompted to create your platform. Once created using your school details, you will be taken to this onboarding page where you will see a list of tasks with step-by-step instructions.

If you log out of your platform, you can return to the onboarding tasks at any time via this blue tab on your dashboard

Bursary Application Year

2023/2024

2022/2023

Bursary 3

Registered Students 3

Applications Completed 2

True FSM 0

Discretionary FSM 0

Vulnerable Bursary 0

Keycard Holders 0

Standard Laptop Issued 0

Specialist Laptop Issued 0

Onboarding

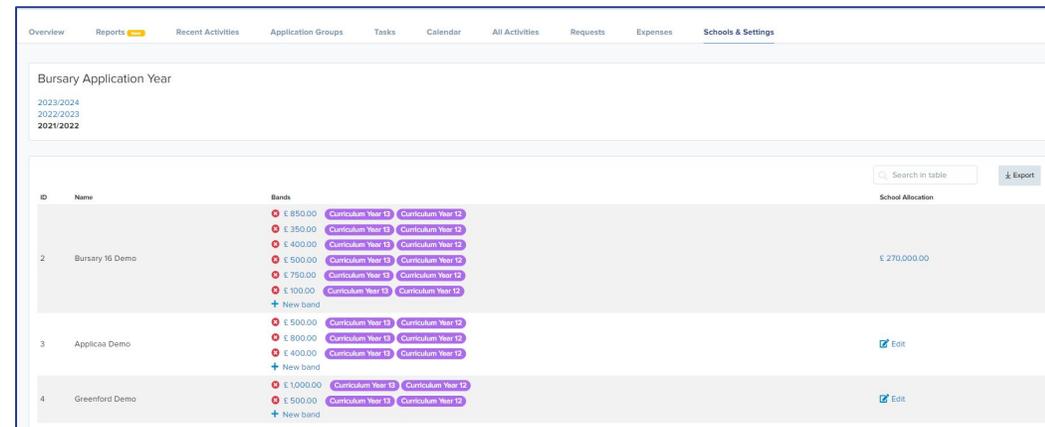
Once you have completed these tasks, please book a meeting with your Customer Success Manager for initial training and to answer any questions you may have.

3

GENERAL SYSTEM SETTINGS

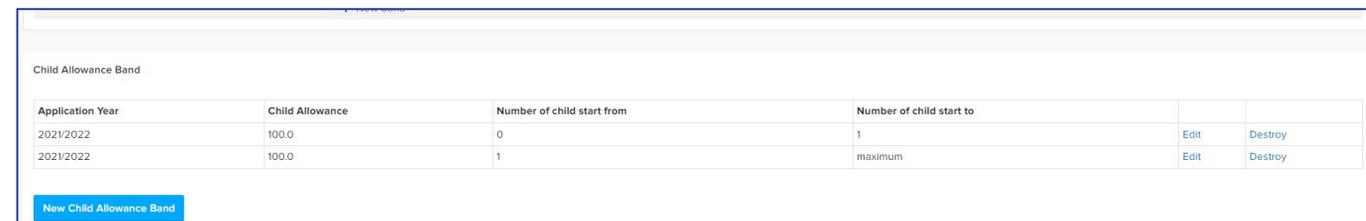
We can easily link your bursary platform to your A+ platform so your enrolled students can log in using the same credentials and begin an application for the bursary fund. Their basic details will pull across to Bursary16+

Please ask your CSM connect the platforms for you.



In the 'Schools & Settings' tab you can edit the bands to suit your school, and enter the total allocation you have for that academic year.

In this area you can also set an allowance for dependent children; if you would like the platform to reduce the 'household income' where there are a large number of children in the household, you may do so here -

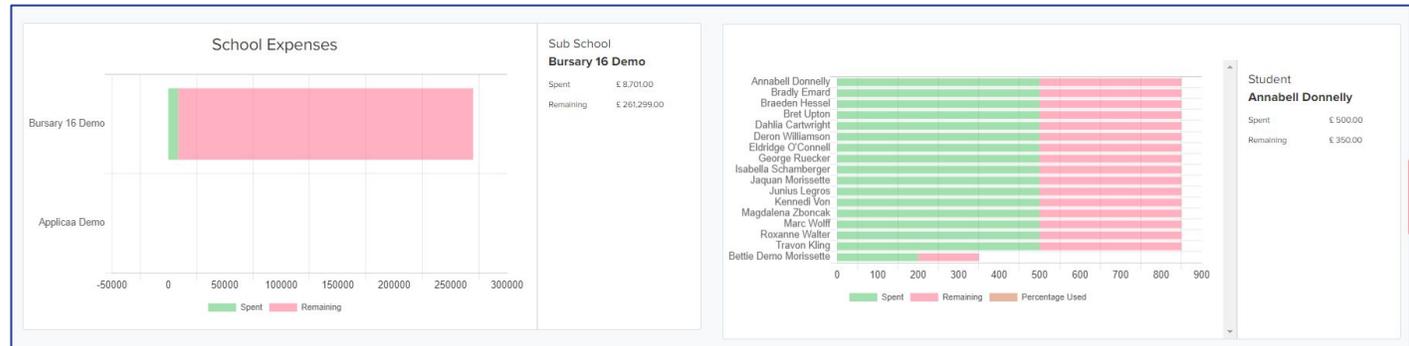


5

GRAPHS & GROUPS

The graphs on the dashboard will be populated with data once you start customising your schools & settings tab.

The graph on the left shows the allocation & remaining amount for the school overall; the graph on the right shows the allocation & remaining amount for students within that school.



You can create and edit application groups in your platform, to categorise and separate lists of students as you need. Students must be manually added to groups and you can choose whether they can be part of one group only, or multiple groups.

Grouping mode ⓘ

Student can only be in one group at a time Student can be in multiple groups

Send email when adding students to group at the table

Showing 1 to 14 of 14 entries Show 50 entries

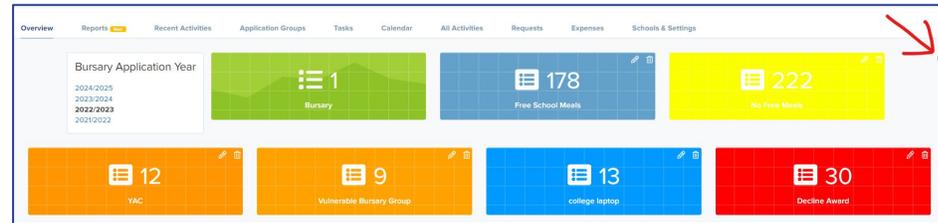
Group Name	Enrolment Status	Students
Living independently		3
LAC		0
YAC		3

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DASHBOARD TILES

There are a few tiles on your dashboard as defaults; these are ones we think you will find useful but you can switch them off via Settings, Form Settings, Dashboard Settings.

You also have the option to add your own custom tiles to create lists of students based on your criteria; simply click on the + icon to begin.



You can then choose a name, colour and filters for your tile, and click Save Card.

Students will automatically be added to your tiles as they meet your criteria, and by clicking on the tile you will see a list of only those students.

There are many filters and options available so for common choices or guidance, please ask your CSM.

The 'Edit dashboard card' form includes the following fields and sections:

- Title:** Free School Meals
- Card Colour:** Blue
- Advanced Filters:**
 - Status:** Properties
 - Application Form Response:** 1
 - Reference Form:**
 - Exam Result:**
 - Total Point Score:**
 - Average Point Score:**
 - Number Of Qualifications:**
 - Additional Columns:**
- Bursary Renewable:** All
- Renewal:** All
- Bursary Year:** All
- Sub School:** All
- Approval Band:** All
- Application Group:** Select Group
- Form Group:** Select Form Group
- Course:** Select Course
- Applied Year Group:** Select Year Group
- Expected Year of Entry:** Select Year of Entry
- Expected Term of Entry:** Select Term of Entry
- Imported From:** Select Source
- Payment Skipped:** Select Source
- Date Started:** Is On, dd/mm/yyyy
- Date Submitted:** Is On, dd/mm/yyyy

Save Card

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STUDENT HOMEPAGE AND WORKFLOW

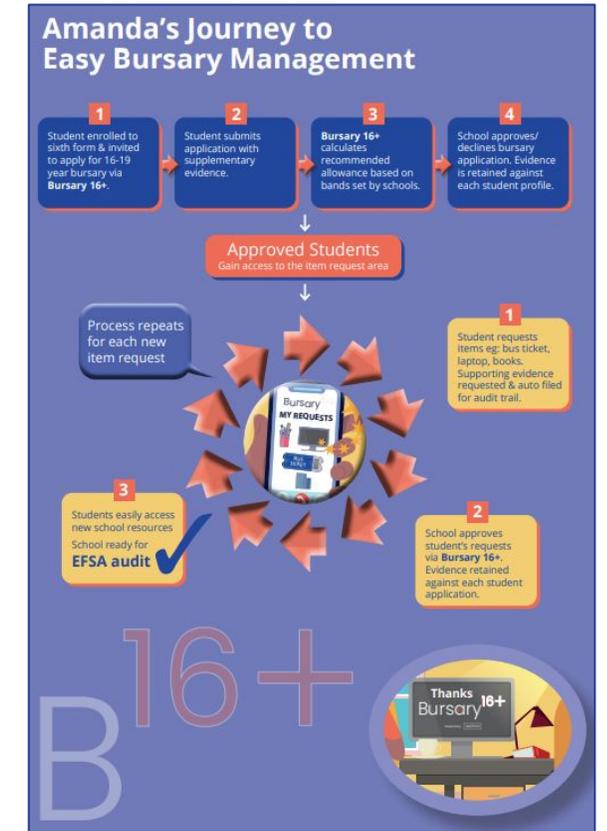
Your student homepage will be configured during your onboarding tasks but if you would like to make changes after this, go to the Settings cog in the bottom left, then Form Settings, Student Homepage

The screenshot shows a student's homepage with the following elements:

- Student Code:** U-B6A0
- Test Internal FN Test External FN** (12/12/2004)
- Form Status:** Completed
- Bursary Form:** Not Started, with an **Update** button.
- Progress:** 0% with a **Continue Application** button.
- Bursary Status:** 2021/2022, Not Started, with a **Withdraw** button.
- Welcome Message:** Welcome! Solihull Sixth Form College believes everyone should have access to an outstanding education. Our bursaries are awarded in cases of financial hardship as every student should be able to realise their potential. We offer bursaries so that a student's education can be of a high quality regardless of their financial situation; a bursary is directly related to the income and financial resources of the pupil's family. You can check the status of your application at any time on this page. Once your application has been validated, this means we have all the information we require from you and we will be in touch to inform you of the outcome of the assessment. If you have any questions regarding the bursary process, you can email the Bursary Team at bursary@solihullstfc.ac.uk or phone them on 0121 709 7803.

Here is an overview of the flow of the platform; students complete their application then once they are approved onto the fund by the system (using the bands you have set up), they gain access to make requests from the school.

Students then log in to their profile to make requests throughout the year as and when they need.



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APPLICATION FORM CONFIGURATION

As you saw in Slide 2, the ESFA have published 'common errors' on why schools may fail the audit, so you can be sure to include all necessary questions in your form.

Please see on our Knowledge Base, a PDF guide on [how to customise your application form](#)

There are questions on the household information step that trigger questions on the income step ie if the student selects that they live with one parent, they will only be prompted to provide one set of income information on the following step.

For personalised training on how to customise your form and add questions specific to your school, or for any further guidance, please contact your Customer Success Manager.

The screenshot displays a 'Preview' window of an application form configuration tool. At the top, a progress bar shows seven steps: Step 1 (Welcome), Step 2 (Agreement), Step 3 (Pupil), Step 4 (Household Information), Step 5 (Income), Step 6 (Dependent Children), and Step 7 (Bursary Summary). Step 4 is currently selected and highlighted. Below the progress bar, the 'Family Setting' section is visible. It contains a question: 'Who do you usually live with?' with a warning icon. Below the question is a dropdown menu with the following options: 'Both parents', 'Mother', 'Father', 'Other family member', 'Legal Guardian', and 'Living Independently'. Below the dropdown, there are two bullet points: 'If someone other than your parent (eg. Legal Guardian or Other Family Member) is responsible for you financially, please fill in their details below.' and 'If you are living independently, then please fill in your own details below'. Below the bullet points are input fields for 'Title*' and 'First Name*'. At the bottom of the window, there are 'Close', 'Back', and 'Next' buttons.

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EMAIL TEMPLATES

In your Communications & Events tab you will see sections for Manual Messages, Automated Messages and Scheduled Messages.

The platform has several email templates already available for you to use. We would recommend having a look through these templates, seeing which ones you would like to have switched on / off, and making any changes to them to reflect the messages you would like to use at your school.

Before you send any emails via your new platform, it is important to set your default emails; this will determine which email address your emails will be sent from (visible to parents) and also which email address replies will go back to. You can set these by going to one of your email areas, clicking the three dots in the top right corner, and choosing 'Set Default Email'.

Please see [this video](#) for an overview of the communication area, and of course contact your CSM for additional help and guidance.

The screenshot shows the 'Communications' interface with the 'Automated Messages' tab selected. A table displays the following data:

Type	Template Name	Subject	Send from	Send to	Triggered by	Phase	Triggered when	Repeat	Enable
	<input type="text" value="Search Template"/>	<input type="text" value="Search Subject"/>	<input type="text"/>	<input type="text"/>					
	Bursary								
	Un-used Email Templates								
<input checked="" type="checkbox"/>	Duplicate Application Deleted	Duplicate application detected for Zebra Bursary 16 to 19 School Demo	admin@appliance.com	Student	Staff	Application Form	Duplicate application deleted	N/A	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Confirm Application Submission To The Student	9 SCHOOL_NAME Bursary Scheme - Confirmation of Submission - NOT IN USE	admin@appliance.com	Student	Applicant	Application Form	Confirm application submission to the student	N/A	<input type="checkbox"/>

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REQUESTS & EXPENSES

Once students have been awarded the bursary, they will be able to access the request area; this button will become visible on their homepage, allowing them to request items from the school bursary fund.

The screenshot shows a student's homepage for Bettie Demo Morisette. The student code is 2GMF. The bursary form is marked as 'Completed' with a 100% progress bar. A 'Continue Application' button is visible. A 'My Requests' button is highlighted with an orange arrow. The page also features a welcome message and contact information for the Bursary Team.

The screenshot shows a 'Request' form with fields for 'Request type', 'Reason', and 'Amount'. Below the form is a 'Save' button. Below the form is a table of previous requests.

Date	Student	Type	Item	Amount	Reason	Status	Actions
08/12/2021	Bettie Demo Morisette	Purchase	College Laptop	£ 200.00	IT issues	Completed	Edit Delete
10/12/2021	Bettie Demo Morisette	Reimbursement	Bus Tickets	£ 20.00	Travel to school	Actioned	Edit Delete
08/12/2021	Bettie Demo Morisette	Reimbursement	Bus Tickets	£ 68.00	Travel to school	Pending	Edit Delete
09/12/2021	Bettie Demo Morisette	Reimbursement	Bus Tickets	£ 25.00	Travel to school	Approved	Edit Delete
08/12/2021	Bettie Demo Morisette	Reimbursement	Textbook	£ 25.00	Needed for History	Actioned	Edit Delete
25/01/2022	Bettie Demo Morisette	Reimbursement	Bus Tickets	£ 20.00	Travel to school	Approved	Edit Delete
08/06/2022	Bettie Demo Morisette	Reimbursement	Bus Tickets	£ 12.00	Travel to school	Pending	Edit Delete
08/12/2021	Bettie Demo Morisette	Purchase	Printer Credits	£ 5.00	Homework	Approved	Edit Delete
28/04/2022	Bettie Demo Morisette	Purchase	Book	£ 50.00	Needed for Psychology	Pending	Edit Delete

Showing 1 to 9 of 9 entries. Add Request

Students can then add requests using the form you have customised, select items preset by you, and upload evidence of purchase, or a link for the school to purchase on their behalf.

A list of all previous requests is visible to the students so they can track the progress.

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REQUESTS & EXPENSES

Staff members can log in to process students requests; you can set email notifications for each request or you can check periodically, filter by which are pending status, and process as needed.

Id	Student Code	Date	Students	Schools	Request Type	Item	Amount	Reason	Status
11535	2GMF	08/06/2022	Bettie Demo Morissette	Bursary 16 Demo	Reimbursement	Bus Tickets	£ 12.00	Travel to school	Pending
11890 11854	6GLC NROO	08/06/2022	Adelle Nicolas Alan Hickie	Bursary 16 Demo Bursary 16 Demo	Purchase	School Trip	£ 50.00	Geography	Approved
11620	9WYQ	25/05/2022	Zena Tromp	Bursary 16 Demo	Purchase	Printer Credits	£ 10.00		Declined
11620	9WYQ	25/05/2022	Zena Tromp	Bursary 16 Demo	Purchase	Book	£ 5.00		Actioned
11535	2GMF	28/04/2022	Bettie Demo Morissette	Bursary 16 Demo	Purchase	Book	£ 50.00	Needed for Psychology	Pending
11601 11312	GBU1 JB9Z	28/04/2022	Aryanna Hansen George Ruecker	Bursary 16 Demo Bursary 16 Demo	Purchase	School Trip	£ 100.00	Needed for History	Approved
11535	2GMF	25/01/2022	Bettie Demo Morissette	Bursary 16 Demo	Reimbursement	Bus Tickets	£ 20.00	Travel to school	Approved
11535	2GMF	10/12/2021	Bettie Demo Morissette	Bursary 16 Demo	Reimbursement	Bus Tickets	£ 20.00	Travel to school	Actioned
11535	2GMF	09/12/2021	Bettie Demo Morissette	Bursary 16 Demo	Reimbursement	Bus Tickets	£ 25.00	Travel to school	Approved
11231	UCR6	08/12/2021	Annabell Donnelly	Bursary 16 Demo	Purchase	Scientific Calculator	£ 12.00	Homework	Approved

In some circumstances you may wish to raise an expense to be taken from the overall school bursary fund, rather than an individual student's allocation. For this we have the 'Expenses' option.

Date	Created By	Expense	School	Amount
08/05/2022	Amanda Applice Support	Laptop vat	Applice Demo	£ 2.00
24/05/2022	Amanda Applice Support	laptop	Bursary 16 Demo	£ 100
08/12/2021	Amanda Applice Support	Talk on student finance	Bursary 16 Demo	£ 500.00

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ADDITIONAL SETTINGS

When a student has been eligible for the bursary during Year 12, as per the ESFA guidance they will need to reapply to access the funds again in Year 13.

For them to do this, you must make their status 'Bursary Renewable' -

The screenshot shows a web application interface for managing bursary applications. A modal window titled "Bulk Update Users" is open, allowing the user to update the "Is Bursary Renewable" property for selected students. The property is set to "Is Bursary Renewable" and the value is set to "Yes". A "Save" button is visible at the bottom of the modal. In the background, a table of "Registered Students" is visible, with columns for ID, Student Code, First Name, Last Name, Email/Username, Current School Name, Started, Submitted, Reference Submitted, and Bursary Renewable. An orange arrow points to the "Bulk Update" button in the table's toolbar.

ID	Student Code	First Name	Last Name	Email/Username	Current School Name	Started	Submitted	Reference Submitted	Bursary Renewable
11404	BONS	Adela	Stark	studentdemo@applicaa.com	Bursary 16 Demo	28/09/2021	17/10/2021		No
11890	6GLC	Adele	Nicolas	student188@applicaa.com	Bursary 16 Demo	14/10/2021			No
11854	NROO	Alan	Hickle	student95@applicaa.com	Bursary 16 Demo	12/10/2021	12/10/2021		No
11222	KH0N	Albert	Bechtelar	student223@applicaa.com	Bursary 16 Demo	27/09/2021	27/09/2021		No
11534	MFP4	Alexandrea	Osinski	student518@applicaa.com	Bursary 16 Demo	30/09/2021	17/10/2021		No
11682	YHS3	Alexanne	Meyert	student354@applicaa.com	Bursary 16 Demo	04/10/2021	04/10/2021		No

You can do this individually via the student profile, or in bulk by going to the registered students table, selecting the students you wish to activate the application form for again, and choosing Bulk Update.



THANK YOU

We hope you have found this guide useful.
To book training, please contact your CSM